

# Coordinated Entry: Family Shelter Training

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Marin County

# Agenda

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

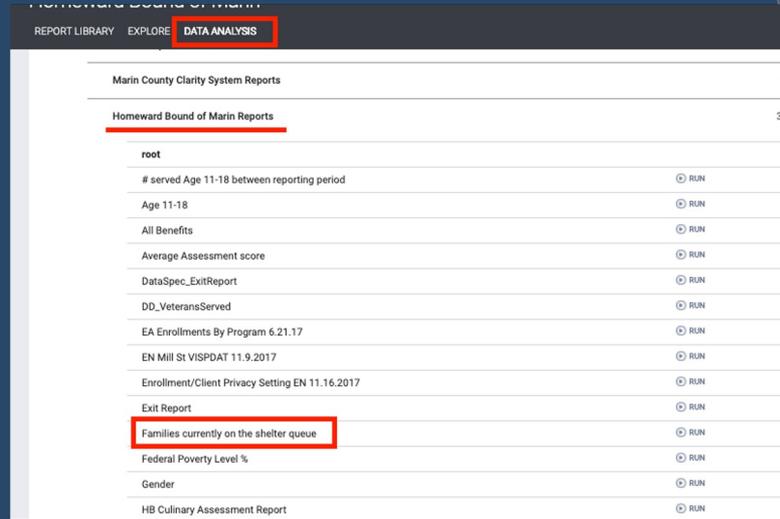
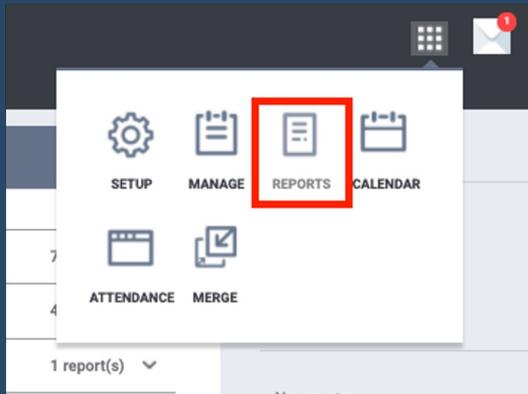
- Complete the Family Shelter Screening
- Refer a family from the *Family Shelter Queue* to the family shelter program
- Process a referral by
  - Changing a referral from pending to pending in-process
  - Denying a referral
  - Accepting a referral by enrolling the client

# How to know who is on the Shelter Queue



# 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



# 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*

The screenshot displays the Bitfocus Test interface. At the top, the title "Bitfocus Test" is shown. Below it is a navigation menu with tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS (highlighted with an orange border), NOTES, FILES, CONTACT, and LOCATION. A yellow warning banner below the menu reads: "Release of Information is Missing or Permission Not Provided. Please review to ensure compliance." Underneath the banner is a section titled "ASSESSMENTS". This section contains two assessment entries. The first is "Advanced Training Modules Survey" with a "START" button. The second is "Family Shelter Screening" with a "START" button that is highlighted with an orange border.

# 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

FAMILY SHELTER SCREENING

Assessment Date 09/03/2020 

First and Last Names of Adult(s) (for Megan's Law Check) Test 

First and Last Names of Adult(s) (for Megan's Law Check) Bitfocus

Megan's Law Check

FAMILY SHELTER SCREENING

Assessment Date 09/03/2020 

First and Last Names of Adult(s) (for Megan's Law Check) Test 

First and Last Names of Adult(s) (for Megan's Law Check) Bitfocus

Megan's Law Check

HOUSING SITUATION

Where is the family currently living? Select 

What would make it possible for you to be able to stay where you are longer?

If staying with friends or family, how long can you stay?

Can I provide you with resources for the county you're in?

FAMILY COMPOSITION

Family size (including the HOH)

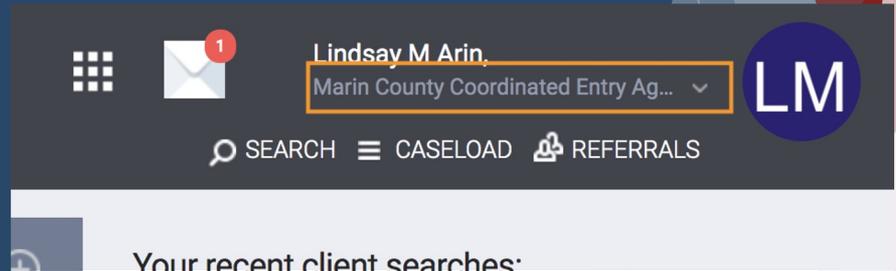
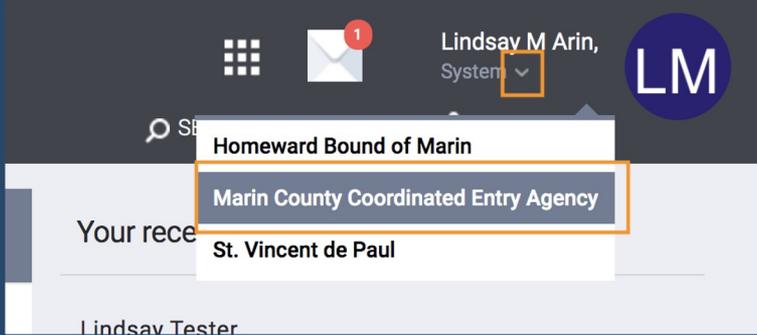


# Referring a Client from the Family Shelter Queue



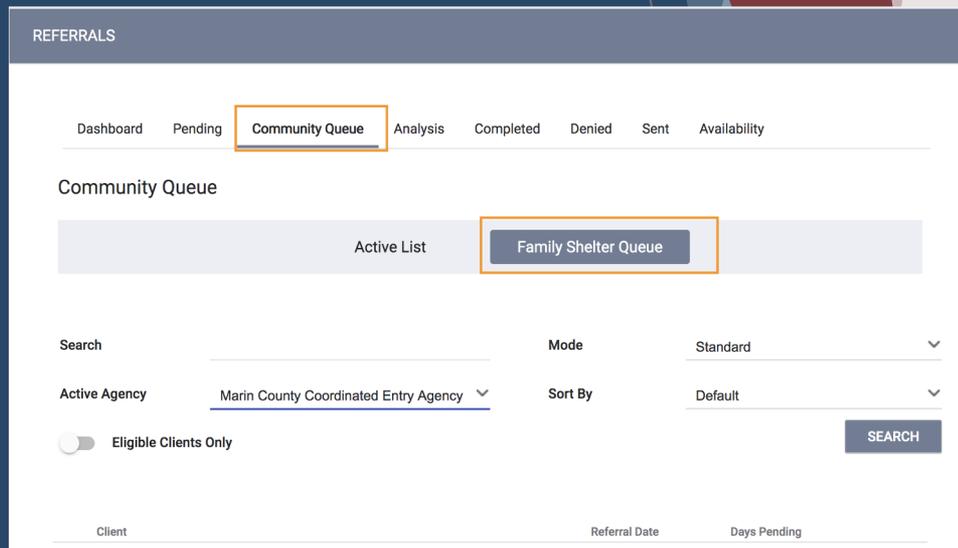
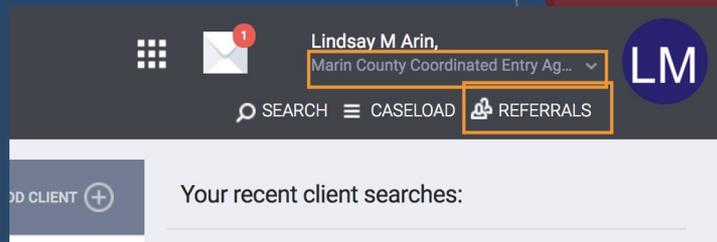
# Family Shelter Queue

- 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

### Community Queue

Family Shelter Queue Active List

Search

Active Agency

Eligible Clients Only

Mode

Score Range

Sort By



# 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

REFERRALS

Dashboard Pending **Community Queue** Analysis Completed Denied Sent Availability

Community Queue

Active List Family Shelter Queue

Search Mode Standard

Active Agency Homeward Bound of Marin Sort By Default

Eligible Clients Only

Client	Referral Date	Days Pending
 Jane Smith Referred by: Marin County Coordinated Entry Agency ⓘ	08/18/2020	16
Lindsay Tester Referred by: Marin County Coordinated Entry Agency ⓘ	09/03/2020	0

# 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*

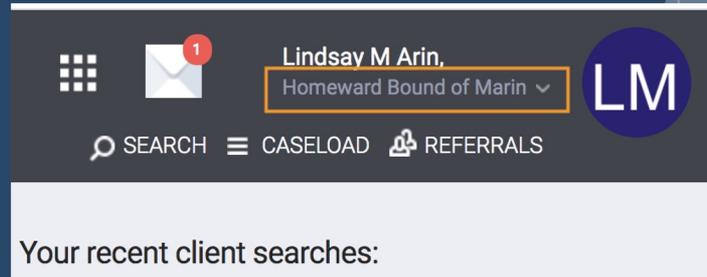
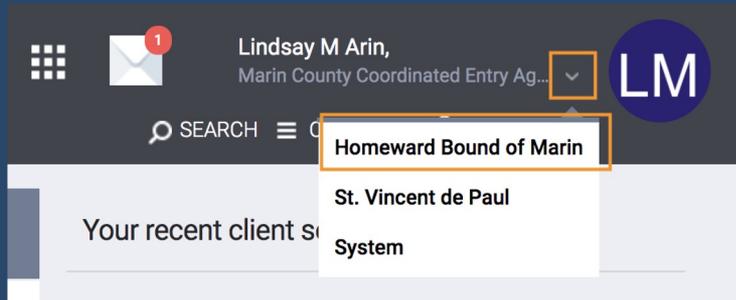
The screenshot displays the 'RE-ASSIGN' section of the Family Shelter Queue interface. It features a 'Program' dropdown menu with the following options: '-- Select Program --', 'Marin County ES Program', and 'Marin County PSH Program'. The 'Marin County ES Program' option is selected. Below the dropdown are 'SAVE CHANGES' and 'CANCEL' buttons. The interface also includes a 'REMOVE FROM QUEUE' button at the bottom and a 'RE-ASSIGN' header at the top of the section.

# 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*

The screenshot shows the top right corner of the application. The user's name, Lindsay M Arin, and organization, Homeward Bound of Marin, are displayed. A notification badge with the number '1' is next to the user's profile icon. The navigation bar includes 'SEARCH', 'CASELOAD', and 'REFERRALS' (which is highlighted with an orange box). Below the navigation bar, the text 'our recent client searches:' is visible.

The screenshot shows the 'REFERRALS' section of the application. The 'Pending' tab is selected and highlighted with an orange box. Below the tabs, the 'Pending Referrals' section is visible. It includes a search bar with 'UID or Name' entered, a 'Mode' dropdown set to 'Standard', and a 'Sort By' dropdown menu with 'Default' selected. A 'SEARCH' button is also present. Below the search and filter options, there is a table of referrals. The 'Days Pending' column is highlighted with an orange box. The table contains two rows of data for clients Sara Test and Johnny Doe.

Client	Referral Date	Qualified	Days Pending
<b>Sara Test</b> Program: Marin County PSH Program Referred by: Marin County Coordinated Entry Agency ⓘ	08/17/2020	Reassigned	17 total 7 pending
<b>Johnny Doe</b> Program: Marin County PSH Program Referred by: Marin County Coordinated Entry Agency ⓘ	08/18/2020	Reassigned	16 total 16 pending

# 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

Sort by: Default    Eligible Clients Only

SEARCH

Client	Referral Date	Qualified	Days Pending
 Sara Test Program: Marin County PSH Program Referred by: Marin County Coordinated Entry Agency ⓘ	08/17/2020	Reassigned	17 total 7 pending
Johnny Doe Program: Marin County PSH Program Referred by: Marin County Coordinated Entry Agency ⓘ	08/18/2020	Reassigned	16 total 16 pending

VI-SPDAT-V2 score    9

Referred by Staff    Sara Hoffman ⓘ

Case Manager    Select ▾

Last Activity    08/17/2020    CHECK-IN

Status     Pending  
   Pending - In Process  
   Denied  
   Expired

Private

SAVE CHANGES    CANCEL

# 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

The screenshot shows a web form for processing a referral. The 'Status' dropdown is set to 'Denied'. Below it, four fields are highlighted with orange boxes: 'Send to Community Queue' (a dropdown menu), 'Denied By Type' (a dropdown menu), 'Denied Reason' (a dropdown menu), and 'Denial Information' (a text input field). At the bottom, there is a 'Private' toggle switch and two buttons: 'SAVE CHANGES' and 'CANCEL'.

The screenshot shows the 'Denied Reason' dropdown menu. The menu is open, displaying a list of reasons for denial. The first option is 'Select' with a checkmark. The other options are: 'Lack of Eligibility', 'Full Capacity/No Availability', 'Client out of Jurisdiction', 'Client previously received service', 'Needs could not be met by program', 'Disagreement with rules', 'Client refused services', 'Client did not show up or call', 'Referral time expired', 'Self Resolved - Client Housed', 'Falsification of Documents', 'Denied by Landlord/Property Manager', and 'Other'.

# 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 enroll the client and household into the family shelter program

<u>Pending</u>	Community Queue	Completed	Denied	Sent
REFERRAL: EDIT				
Client	Sara Test			
Referred Program	Marin County PSH Program			
Referred to Agency	Homeward Bound of Marin			

# 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

Processing Referral (or) Select Referral

Program Placement a result of Referral provided by Marin County Coordinated Entry Agency

Include group members:  
 Baby Tester

DOC REQUIREMENTS

ENROLL

# Resources

## Bitfocus Help Desk

[marin@bitfocus.com](mailto: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

