

# Coordinated Entry: Provider Training

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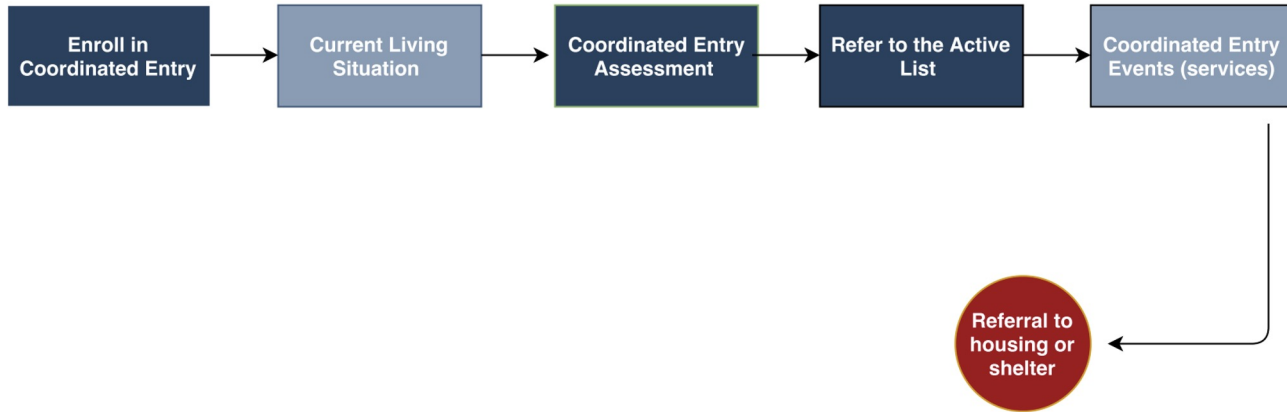
Marin County



# Agenda

- ▶ Pending Referrals Tab
- ▶ Changing the status of referrals
- ▶ Referral Notifications
- ▶ Denying a referral
- ▶ Accepting a referral
- ▶ Reports
- ▶ Resources

# What Happens Before



# Managing Referrals



# Referral Notifications

- ▶ Providers will receive a notification via email/ Clarity Inbox when a referral has been sent to their program
  - ▶ **Providers need to make sure the appropriate staff are set-up to receive notifications**
  - ▶ Agency Leads should contact the Bitfocus Helpdesk at [marin@bitfocus.com](mailto:marin@bitfocus.com) or 415.429.4211 to make any changes

# Referral Notifications



Dear Sara Hoffman,

The following Referrals have been Pending more than 7 days:

| Client   | Referral Date | Days Pending |
|--|---------------|--------------|
| <a href="#">35266B209</a><br>Program: Evergreen Family Individual Room Shelter<br>Referred By: [TRAINING] San Francisco Family<br>Coordinated Entry Agency | 06/02/2020    | 56           |

Questions? Visit our online wiki: [get.clarityhs.help](https://get.clarityhs.help)



# Referrals Tab

Click the *Referrals Button* at the top right of the screen.

The screenshot displays the Bitfocus user interface for Sara's Test Agency. The top navigation bar includes a search icon, a case load icon, and a referrals icon, which is highlighted with a red arrow. The user's name, Sara Hoffman, and initials SH are visible in the top right corner. The main content area is divided into two sections: a search bar on the left and a list of recent client searches on the right. The search bar has a placeholder text and a search button. The list of recent searches includes Apple Pie, Peter Johnson, Juliet Mendoza, Will Wilson, and Annabel Test.

Sara's Test Agency

SEARCH CASELOAD REFERRALS

Sara Hoffman, Sara's Test Agency SH

SEARCH FOR A CLIENT ADD CLIENT

SEARCH

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

Managed with Clarity Human Services Recover deleted data

Your recent client searches accessed:

- Apple Pie
- Peter Johnson
- Juliet Mendoza
- Will Wilson
- Annabel Test



# The Pending Referrals Tab

- ▶ Click the *Pending Tab*
- ▶ Select the client by clicking the edit box to the left of the client's name

REFERRALS

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


### Pending Referrals

Search

Eligible Clients Only

Mode

Sort By

| Client   | Referral Date | Qualified  | Days Pending         |
|--|---------------|------------|----------------------|
|  <b>Apple Pie</b><br>Program: Problem Solving<br>Referred by: Sara's Test Agency | 12/19/2018    | Reassigned | 7 total<br>7 pending |
| <b>Apple Pie</b><br>Program: Blue Sky RRH<br>Referred by: Sara's Test Agency   | 12/26/2018    | Reassigned | 0 total<br>0 pending |

Engaged with Clarity Human Services





# Managing Referrals: Changing the Status

- ▶ Click the *Status* drop down and make the appropriate selection
- ▶ Change from pending to pending-in process within 48 hours
- ▶ Referrals will turn green once the status has been changed

|                      |   |
|----------------------|---|
| Referred to Agency   | Sara's Test Agency  |
| Referring Agency     | Sara's Test Agency  |
| Referred Date        | 12/19/2018 8:51 AM  |
| Days Pending         | 7 day(s)  |
| In Process           | 0 day(s)  |
| Qualified            | Reassigned  |
| Adult Priority score | 57  |
| Referred by Staff    | Sara Hoffman  |
| Case Manager         | Select <input type="text"/>   |
| Last Activity        | 12/19/2018 <input type="button" value="CHECK-IN"/>  |
| Status               | <input checked="" type="checkbox"/> Pending<br><input type="checkbox"/> Pending - In Process<br><input type="checkbox"/> Denied<br><input type="checkbox"/> Expired |
| Private              |   |

REFERRAL CONNECTIONS

# Referral Notifications

| Notification                    | Time    | Action   |
|---------------------------------|---------|--|
| Pending Notification            | 7 days  | If the status of the referral stays in pending status for 7 days or more, the provider will receive weekly notifications until the status is changed             |
| Pending-in Process Notification | 14 days | If the status of the referral stays in pending-in process status for 14 days or more, the provider will receive weekly notifications until the status is changed |



# Denying a Referral

- ▶ Change the status of the referral to denied
- ▶ Four additional fields will populate that need to be answered

1. **Send to Community Queue:** Answer yes if client is still experiencing homelessness
2. **Denied by type:** Provider/client
3. **Denied Reason:** Reason for the denial
4. **Denial Information:** Provide additional details explaining the reason for the denial

Status: Denied

Send to Community Queue: -- Select --

Denied By Type: -- Select --

Denied Reason: Select

Denial Information:

Private:

SAVE CHANGES CANCEL

# Accepting Referrals

- ▶ Accepting the referral enrolls the client and closes the referral simultaneously
- ▶ The “Program placement a result of...” toggle must be on to close the referral
- ▶ The orange pending referral box is a visual to let you know your are enrolling in the right program

The screenshot displays a software interface for managing referrals. At the top, there are two circular gauges: '3 CLIENTS' and '3 UNITS'. Below the 'CLIENTS' gauge, a legend shows 0% Families (red square) and 100% Individuals (blue square). Below the 'UNITS' gauge, a legend shows 10% Checked in (red square), 0% Reserved (blue square), and 90% Available (grey square).

The main content area is divided into several sections:

- Funding Source:** HUD-CoC – Permanent Supportive Housing
- Service Categories:** Housing (checked), Housing Search and Placement (checked), Case Management (checked)
- Availability:** Limited Availability
- PROGRAM AVAILABILITY:** Available openings: 2
- HOUSING AVAILABILITY:** Households without children: 30 Beds in 30 Units
- Program Placement a result of Referral provided by SFHOT Practice Agency:** A toggle switch is currently turned on.
- Include group members:** First Last (unchecked), Castro Valley (unchecked)
- DOC REQUIREMENTS:** A section for document requirements.
- ENROLL:** A button to enroll the client.

There are two red boxes highlighting specific elements: one around the 'Program Placement a result of Referral provided by SFHOT Practice Agency' toggle, and another around an orange box that says '1 pending referral(s). Oldest 116 days.'

# Accepting Referrals


- ▶ The chain link icon indicated that the enrollment is linked to a referral and was completed properly
  - ▶ Indicates the enrollment was completed properly

Bruce Spruce

PROFILE HISTORY SERVICES PROGRAMS NOTES ASSESSMENTS FILES CONTACT LOCATION REFERRALS

HISTORY


Advanced Search Options View ▾


| Service Name  | Start Date | End Date   |   |
|---|------------|------------|---|
| <b>Referral:</b> Denali Transitional Housing<br>Gartner Agency referral to Gartner Agency ⓘ | 06/22/2020 | 06/22/2020 |   |
| Denali Transitional Housing<br>Gartner Agency ⓘ   | 06/22/2020 | Active     |  |


# Move-In Dates


- ▶ Move-in dates should be entered on the enrollment screen
  - ▶ For PSH programs, the move-in date typically matched the enrollment date
  - ▶ For RRH, the enrollment should happen during program intake. The move-in date should be entered later, when the client moves into their unit.

Enroll Program for client Bitfocus Test


Project Start Date  

Anticipated Length of subsidy - no of months  

Is the Client an Adult or Head of Household?  

Is the Program Type a Permanent Housing Program Type?  

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date  

Unit Number


Address

City

Zipcode

PRIOR LIVING SITUATION

Type of Residence

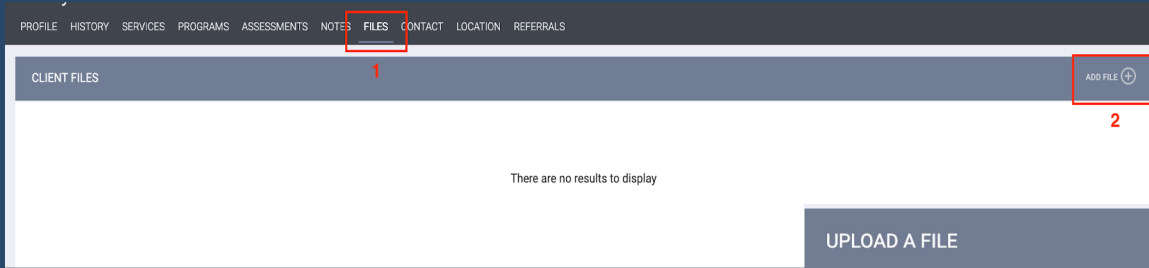
Length of Stay in Prior Living Situation  



# Uploading Documents



# Uploading Documents



### UPLOAD A FILE

**Category** Background Check

**Predefined Name** Credit, Criminal, and/or Eviction-T

**File**

**Private**

**SAVE CHANGES** **CANCEL**

**Select a category and a predefined name from the drop downs.**

**Click Select file and then chose the file from your computer you need to upload.**

**Click Save**





# Let's Talk Reports



# 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

| <b>Referral Statistics</b>                              |  | <b>Sarah Smith Housing Services</b> |  |
|---|--|-------------------------------------|--|
| Dates Between:  |  | 05/01/2018 and 12/27/2018           |  |
| Referral Direction:                                     |  | Outbound                            |  |
| Number of Agency referrals received                     |  | 3                                   |  |
| <b>Pending Referrals</b>                                |  |                                     |  |
| Number of pending referrals                             |  | 1                                   |  |
| Oldest pending referral in days                         |  | 83                                  |  |
| Newest pending referral in days                         |  | 83                                  |  |
| Average pending referral in days                        |  | 83                                  |  |
| <b>Pending - In Process Referrals</b>                   |  |                                     |  |
| Number of pending referrals                             |  | 0                                   |  |
| Oldest pending referral in days                         |  | 0                                   |  |
| Newest pending referral in days                         |  | 0                                   |  |
| Average pending referral in days                        |  | 0                                   |  |
| <b>Completed Referrals</b>                              |  |                                     |  |
| 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                                  |  |
| <b>Denied Referrals</b>                                 |  |                                     |  |
| 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                                  |  |
| <b>Breakdown Of Most Common Denied Referral Reasons</b> |  |                                     |  |
| Client refused services                                 |  | 1                                   |  |

## Breakdown Of Referred Programs

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

| <b>PH - Permanent Supportive Housing (disability required)</b> |                    |   |       |   |   |
|--|--------------------|---|-------|---|---|
| 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 |

| <b>PH - Rapid Re-Housing</b> |                 |   |       |   |   |
|------------------------------|-----------------|---|-------|---|---|
| Agency Name                  | Program Name    | P | P / I | A | D |
| Housing Test Agency          | Rapid Rehousing | 0 | 0     | 1 | 0 |

Thu Dec 27 06:35:56 AM 2018

# 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 |
|------------------------------------|-------------------|------------|--------------|-------------|-------------|-----------|-----|-----------------|--------------|----------|----------------|
| <b>Program: Youth Hope Housing</b> |                   |            |              |             |             |           |     |                 |              |          |                |
| 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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Powered By  1 / 1



# HMIS Data Quality Report

## [HUDX-225] HMIS Data Quality Report (HUD Reports)

- ▶ Who needs support around data entry?
- ▶ Part of HUD's Data Quality Framework
- ▶ Comprehensive data review

# HMIS Data Quality Report

## HMIS Data Quality Report

Seattle/King County CoC: Solid Ground

Report period 04/01/2017 - 04/30/2017

### Q1. Report Validations Table

Program Applicability: All Projects

|   |  |
|---|--|
| Total number of persons served  |  |
| Number of adults (age 18 or over)                                       |  |
| Number of children (under age 18)                                       |  |
| Number of persons with unknown age                                      |  |
| Number of leavers   |  |
| Number of adult leavers   |  |
| Number of adult and head of household leavers                           |  |
| Number of stayers   |  |
| Number of adult stayers   |  |
| Number of veterans  |  |
| Number of chronically homeless persons                                  |  |
| Number of youth under age 25  |  |
| Number of Parenting Youth Under Age 25 with Children                    |  |
| Number of Adult Heads of Household                                      |  |
| Number of child and unknown-age heads of household                      |  |
| Heads of households and adult stayers in the project more than 365 days |  |

### Q2. Personally Identifiable Information (PII)

Program Applicability: All Projects

| Data Element                 | Client Doesn't Know/Refused | Information Missing | Data |
|------------------------------|-----------------------------|---------------------|------|
| Name (3.1)                   | 6                           | 0                   |      |
| Social Security Number (3.2) | 3                           | 0                   |      |
| Date of Birth (3.3)          | 0                           | 0                   |      |
| Race (3.4)                   | 0                           | 0                   |      |
| Ethnicity (3.5)              | 0                           | 0                   |      |
| Gender (3.6)                 | 0                           | 0                   |      |
| Overall Score                |                             |                     |      |

### Q3. Universal Data Elements

Program Applicability: All Projects

| Data Element                             | Error Count | % of Error Rate |
|--|-------------|-----------------|
| Veteran Status (3.7)                     | 0           | 0%              |
| Project Entry Date (3.10)                | 0           |                 |
| Relationship to Head of Household (3.15) | 0           |                 |
| Client Location (3.16)                   | 0           |                 |
| Disabling Condition (3.8)                | 0           |                 |

### Q4. Income and Housing Data Quality

Program Applicability: All Projects

| Data Element                                  | Error Count |
|---|-------------|
| Destination (3.12)                            | 0           |
| Income and Sources (4.2) at Entry             | 0           |
| Income and Sources (4.2) at Annual Assessment | 2           |
| Income and Sources (4.2) at Exit              | 0           |

### Q5. Chronic Homeless

Program Applicability: ES, SH, Street Outreach, TH & PH(All)

| Entering into project type | Count of total records | Missing time in institution (3.917.2) | Missing time in housing (3.917.2) | Approximate Date started (3.9.17.3)<br>DK/R/missing |
|----------------------------|------------------------|---------------------------------------|-----------------------------------|---|
| ES, SH, Street Outreach    | 0                      |                                       |                                   | 0   |
| TH                         | 0                      | 0                                     | 0                                 | 0   |
| PH (all)                   | 36                     | 0                                     | 0                                 | 0   |
| Total                      | 36                     |                                       |                                   |   |

### Q6. Timeliness

Program Applicability: All Projects

| Time for Record Entry | Number of Project Entry Records | Number of Project Exit Records |
|-----------------------|---------------------------------|--------------------------------|
| 0 days                | 0                               | 0                              |
| 1-3 days              | 17                              | 0                              |
| 4-6 days              | 2                               | 0                              |
| 7-10 days             | 4                               | 3                              |
| 11+ days              | 50                              | 0                              |

### Q7. Inactive Records: Street Outreach and Emergency Shelter

Program Applicability: Street Outreach & ES-Night By Night

| Data Element   | # of Records | # of Inactive Records | % of Inactive Records |
|--|--------------|-----------------------|-----------------------|
| Contact (Adults and Heads of Household in Street Outreach or ES-NbN) | 0            | 0                     | 0%                    |
| Bed Night (All clients in ES-NbN)                                    | 0            | 0                     | 0%                    |

### Programs Included in Dataset

| Agency       | Program Name            |
|--------------|-------------------------|
| Solid Ground | PG Kenney Place - CoC   |
| Solid Ground | Sand Point Families PSH |

# Reports

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





# 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

