Coordinated Entry: Provider Training

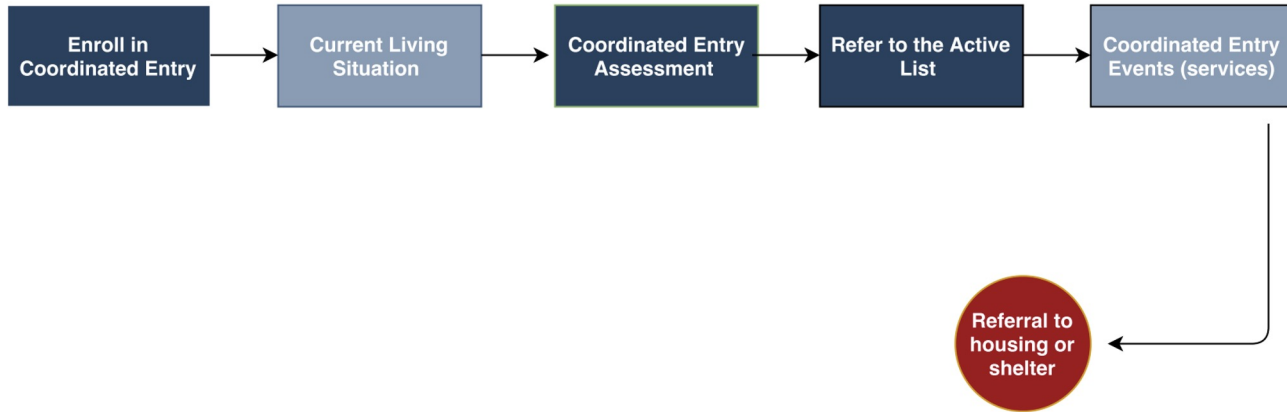Marin County

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Agenda

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

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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 or 415.429.4211 to make any changes

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Referral Notifications

Referrals Tab

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

The Pending Referrals Tab

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

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 Ageny
Referring Agency	Sara's Test Ageny
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
Last Activity	12/19/2018 CHECK-IN
Status	✓ Pending
	Pending – In Process
	Denied
	Expired
Private	

SAVE CHANGES   CANCEL

REFERRAL CONNECTIONS

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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

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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

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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

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

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.

Uploading Documents

Uploading Documents

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

CLIENT FILES   ADD FILE ⊕

1

2

There are no results to display
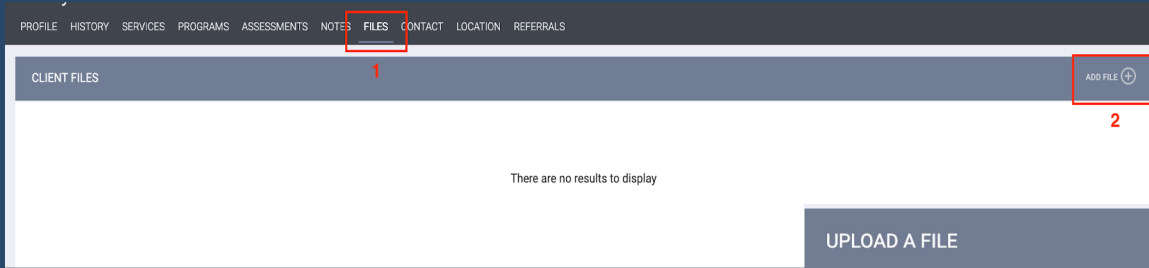
UPLOAD A FILE

Category	Background Check ⌄
Predefined Name	Credit, Criminal, and/or Eviction-T ⌄
File	Select File
	Trouble attaching files? Switch to the **Basic Uploader**
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

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Referral Statistics Report

Left Panel

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

Right Panel

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

Thu Dec 27 06:35:56 AM 2018

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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

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Program Roster

Program Roster Report

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]

Thu Dec 27 06:53:00 AM 2018

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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

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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	Da...
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 Co...
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) DK/R/missin...
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!!!!

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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

The Help Desk Widget

? Help

Help

How can we help?

Top suggestions

1. Creating and Managing Program Enrollments
2. How Do I Manage Program Goals?
3. How Do I Receive Assessment Due Warnings?

Contact us

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