

2020 Coordinated Entry Data Standards Training



Welcome

No matter how educated,
talented, rich or cool you believe
you are, how you treat people
ultimately tells all. Integrity
is everything.



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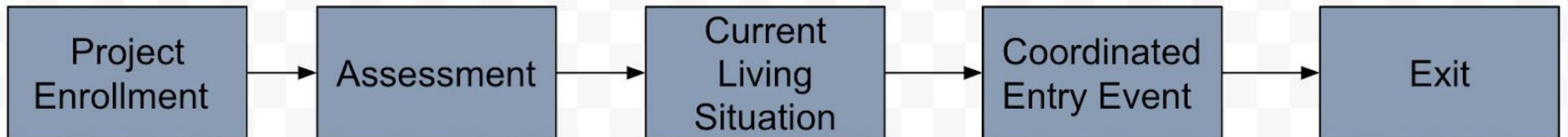
Intentions & Agenda

- Uncover the new 2020 Coordinated Entry Data Standards
- Discuss Access Point Staff roles and tasks as it relates to Coordinated Entry Data Standards
- Share helpful resources such as reports, slide deck and help desk articles that will be used to support your workflow and continuous data quality.
- Overview of 2020 Data Standards
- Summary of changes
 - Program Enrollments
 - Coordinated Entry Assessments
 - Current Living Situation Assessments
 - CE Events
 - Exits
- Helpful Resources

Coordinated Entry 2020 Data Standards Overview

2020 Coordinated Entry Data Standards Overview

- HMIS data standards have been established by the U.S. Department of Housing and Urban Development (HUD), the U.S. Department of Health and Human Services (HHS), and the U.S. Department of Veterans Affairs (VA) to allow for standardized data collection on homeless individuals and families across systems.
- This year, part of the Data Standard changes included new requirements for Coordinated Entry programs. The following snapshot below outlines the data standards and changes to the Coordinated Entry workflow.



Coordinated Entry Enrollments

Program Enrollment:

- Program Enrollments are used to facilitate linkage between the client and a specific agency the client is being served by.
- All clients who are eligible for Coordinated Entry should be enrolled into a Coordinated Entry Program
- In many cases, fields from the enrollment will “cascade” forward to other fields/screens in ONE
- Enrollments are a HUD requirement

2020 Data Standard Changes: Program Enrollment

Current State	New/ Revised
<p>Complete a Coordinated Entry (CE) enrollment under the applicable access point program. Only the family CE enrollment screens include the prior living situation (3.917) question set</p>	<p>Prior Living Situation (3.917) fields will now show on the Youth and Adult CE Enrollment Screens</p>

PRIOR LIVING SITUATION

Type of Residence

Length of Stay in Prior Living Situation

Length of Stay Less Than 90 Days

On the night before - stayed on the streets, ES, or Safe Haven

Approximate Date Homelessness Started

Number of times on the streets, in ES, or SH in the past three years

Total number of months homeless on the streets, in ES, or Safe Haven in the past three years

How to Complete A Program Enrollment

- **Step 1:**

To Begin the enrollment process

Click on the **Program Tab** in the top menu of the client record. You will see two sections:

- **Program History:** Which provides a list of the programs your client is either currently enrolled in, or has been enrolled into in the past
- **Programs Available:** Indicates programs provided by your agency that are available for client enrollment

- **Step 2:**

Select the **drop down arrow** next to the applicable program

The screenshot displays the client record for Sparkle Jonez. The top navigation bar includes tabs for PROFILE, HISTORY, SERVICES, PROGRAMS (which is selected), NOTES, FILES, CONTACT, LOCATION, REFERRALS, and ASSESSMENTS. Below the navigation bar, there are two main sections: PROGRAM HISTORY and PROGRAMS: AVAILABLE. The PROGRAM HISTORY section shows "There are no results to display". The PROGRAMS: AVAILABLE section lists several programs, each with a drop-down arrow on the right. The drop-down arrow for "ECS: Bayview Access Point" is highlighted with a red box.

PROGRAMS: AVAILABLE	
ECS: 440 Turk Access Point	▼
ECS: Access Partner- Psychiatric Emergency Services	▼
ECS: Access Partner- SFHOT	▼
ECS: Bayview Access Point	▼
ECS: Mobile Access Point	▼
ECS: SOMA Access Point	▼
Housing Stabilization	▼
Problem Solving	▼

How to Complete A Program Enrollment

Step 3:

- If you are enrolling a family, be sure to **toggle on** the group members you would like to enroll into the program

Step 4:

- Select the **Enroll button**

PROGRAMS: AVAILABLE

Bayview Access Point ^

Active Clients



16 CLIENTS

- 63 % Families
- 38 % Individuals

Funding Source
Local or Other Funding Source

Availability
Limited Availability

Service Categories:

- ✓ No Category
- ✓ Other
- ✓ RETIRED (Outreach Contact)
- ✓ Transportation
- ✓ Coordinated Entry Event
- ✓ Case Management
- ✓ Housing Search and Placement
- ✓ Financial

PROGRAM AVAILABILITY:

▶ Available openings 1

Include group members:

Malia Mouse

Make sure household member are toggled on

DOC REQUIREMENTS

ENROLL

How to Complete A Program Enrollment

- A similar enrollment screen will open. You may notice that some of the fields auto-populated. Please confirm the information is up-to-date
- When possible, **complete all fields.**
- **Avoid answering “Data Not Collected” whenever possible**
- **Select Save & Close**

Enroll Program for client Freddy Fox

Program Entry Date 08/27/2019 

DISABLING CONDITIONS AND BARRIERS

Disabling Condition Select 

Physical Disability Select 

Developmental Disability Select 

Chronic Health Condition Select 

HIV - AIDS Select 

Mental Health Problem Select 

Substance Abuse Problem Select 

Victim of Domestic Violence Select 

CASH INCOME FOR INDIVIDUAL

Income from Any Source Select 

NON-CASH BENEFITS

Receiving Non-Cash Benefits Select 

HEALTH INSURANCE

Covered by Health Insurance Select 

SAVE & CLOSE **CANCEL**

 Audit Log

Powered with Clarity Human Services

If any of the fields auto-populated from a previous enrollment, please confirm the information is still up to date.

Complete all fields when possible. Try to avoid selecting “Data not collected” when possible.

Current Living Situation Assessment

Current Living Situation Assessment: Overview

- Current Living Situations Assessments are used to regularly document the following:
 - The current living situation of people experiencing homelessness
 - Homeless chronicity
 - Risk of imminent homelessness
 - Used to understand how many times a person is engaged while experiencing homelessness
 - Complete a new assessment each time; do not edit the old assessment

“A contact is defined as an interaction between a worker and a client designed to engage the client. Contacts include activities such as a conversation between the worker and the client about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service.”

Current Living Situation Assessment: 2020 CE Data Standards Training

***NEW Changes* Required as part of the 2020 HUD Data Standards**

- For Coordinated Entry Projects, record a current living situation anytime any of the following occurs:
 1. Project Start
 2. A Coordinated Entry Assessment or Coordinated Entry Event is recorded
 3. The client living situation changes



TIPS

The important thing to remember is that everytime you enter a Coordinated Entry Event, you have to enter a Current Living Situation Assessment.

**** we will expand more upon Coordinated Entry Events in the services section of this training**

Current Living Situation Assessment: Overview

To complete the current living situation assessment

1. Select Programs
2. Select Assessments
3. Identify Current Living Situation & choose start
4. Confirm your client is toggled on and select add Current Living Situation Assessment

A screenshot of a software interface showing a navigation menu. The menu items are: PROFILE, HISTORY, SERVICES, PROGRAMS, NOTES, FILES, CONTACT, LOCATION, REFERRALS, ASSESSMENTS. The 'PROGRAMS' item is highlighted with a red box.

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
 ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency	10/07/2019	Active	Individual
Suzanne David Resolution Program			

PROGRAM: ECS: BAYVIEW ACCESS POINT

Enrollment History Provide Services **Assessments** Notes Files Forms × Exit

Assessments

Current Living Situation

LINK FROM ASSESSMENTS

START

A screenshot of a dialog box titled 'ADD PROGRAM ASSESSMENT'. It features a toggle switch for 'Pita Pocket' which is currently turned on. Below the toggle, there is a label 'Grandchild'. At the bottom of the dialog, there is a button labeled 'ADD CURRENT LIVING SITUATION' which is highlighted with a red box.

Coordinated Entry Assessments

Coordinated Entry Assessments

- Determines prioritization for housing resources: housing referral status vs. problem-solving status
- Completed for clients that did not resolve their homelessness via problem solving
- Does NOT guarantee eligibility for a housing resource
- Is not visible to all users to protect client's privacy

**Adult
Coordinated Entry**

**Family
Coordinated Entry**

**Youth
Coordinated Entry**

Coordinated Entry Assessments

Adult Coordinated Entry	Family Coordinated Entry	Youth Coordinated Entry
<ul style="list-style-type: none">• Adult Primary CE Assessment	<ul style="list-style-type: none">● Family Housing Prioritization Assessment	<ul style="list-style-type: none">• Adult Primary CE Assessment



TIPS

***Remember: Adult Primary Assessments apply to Adult and Youth Coordinated Entry
Remember: Family Housing Prioritization Assessments apply family Coordinated Entry***

Coordinated Entry Assessments: 2020 Data Standards

- Users will no longer see two fields that were recently added to the Coordinated Entry Primary Assessments.
- For the two fields below, all Assessments should be answered the same way.
- We set default responses to these questions and hid the questions from the assessment. This change now allows us to reduce the number of questions assessors have to answer

RECAP:

1. Assessment Type--All responses will default to in-person
2. Assessment Level-- All Responses will default to Housing Needs Assessments

Assessment Date 06/08/2020
Assessment Location Select

ADULT HOUSING ASSESSMENT

Select
Crisis Needs Assessment

✓ Housing Needs Assessment

Assessment level should be Housing Needs Assessment

Select
Phone
Virtual

✓ In person

Assessment type should always be in person

Coordinated Entry Assessments

Steps:

1. Select programs
2. Choose the edit icon to the right of the program name
3. Select Assessments
4. Select Start next to the appropriate Assessment
 - Choose Adult primary CE Assessment for Adult/Youth Coordinated Entry
 - Choose Family Prioritization Assessment for Family Coordinated Entry



Program Name	Start Date	End Date	Type
ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency	10/07/2019	Active	Individual

PROGRAM: LYRIC ACCESS POINT

Enrollment History Provide Services **Assessments** Notes Files Forms × Exit

Assessments LINK FROM ASSESSMENTS

Adult Primary CE Assessment START

Assessment History

There are no results to display

Coordinated Entry Assessments: 2020 Data Standards

- Complete the fields of the assessment, being as thorough as possible. ***Please avoid using data not collected as much as possible.***
- Select save, when complete

ADULT PRIMARY CE ASSESSMENT

Assessment Date	10/03/2019	
Assessment Location	3rd Street Youth Access Point	▼
Assessment Type	In person	▼
Assessment Level	Housing Needs Assessment	▼

ADULT HOUSING ASSESSMENT

1) Where did you stay last night? (Living situation, not geography)	Place not meant for human habitation	▼
1a) Have you resided in a shelter, safe haven, or place not meant for human habitation for the last 12 consecutive months?	No	▼
2) In the place you are staying, are you experiencing physical or sexual violence?	Yes	▼
3) How long have you been homeless this time?	One year or more, but less than two years	▼
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)?	Yes	▼

Coordinated Entry Events

Coordinated Entry Events: Overview

What is a Coordinated Entry (CE) Event?

- CE Events are a new HUD requirement in the 2020 CE Data Standards
- Coordinated Entry Event elements are designed to capture key referral and placement events, as well as the results of those events
- CE Events will help communities to understand the events that go into achieving desired (and undesired) results through the Coordinated Entry System

Coordinated Entry Events

When do I record a Coordinated Entry (CE) Event?

- Many of the existing services under the CE programs in the ONE System have been re-categorized as CE Events.
- Good News! This change will have minimal impact to Access Points.

Your role is to keep entering the services as you normally do.

You can see the service category off to the right

PROGRAM: BAYVIEW ACCESS POINT

Enrollment	History	Provide Services	Assessments	Notes	Files	Forms	× Exit
Services							
CE_COVID19_Transition from Hotel to Shelter							Coordinated Entry Event ▾
COVID-19 Allowance for Housing Referral Status Families							Financial ▾
Document Ready/Expiration							Coordinated Entry Event ▾
FCE_COVID19_Direct Services							Case Management ▾
FCE_COVID19_Transportation Shuttle Service							Transportation ▾
Housing Application							Housing Search and Placement ▾
Problem Solving_COVID19_Flex Fund Allowance							Coordinated Entry Event ▾
Refused Housing Referral							Coordinated Entry Event ▾
Refused Individual Room Shelter Referral							Housing Search and Placement ▾
Schedule Appointment With Hamilton Family Congregate Beds (HFCB)							Case Management ▾

Important thing to remember is that everytime you enter a CE Event, you will need to also enter a Current Living Situation

Coordinated Entry Events: 2020 Data Standards

How Do I record a Coordinated Entry Event?

- Access the programs Tab
- Select the Edit icon next to the program name
- Choose Provide Services

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
1.  3rd Street Youth Access Point [TRAINING] San Francisco Youth Coordinated Entry Agency	06/07/2020	Active	Individual

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: 3RD STREET YOUTH ACCESS POINT

2.

Enrollment History **Provide Services** Assessments Notes Files Forms × Exit

Services

Document Ready	Coordinated Entry Event
Failed Housing Outreach Attempt	RETIRED (Outreach Contact)
Housing Application	Housing Search and Placement
Other Outreach Attempt	RETIRED (Outreach Contact)
Prioritized by AP for Outreach	Housing Search and Placement
Problem Solving	Coordinated Entry Event
Problem Solving_COVID19_Flex Fund Allowance	Coordinated Entry Event
Refused Housing Referral	Coordinated Entry Event
Successful Housing Outreach Attempt	RETIRED (Outreach Contact)

Coordinated Entry Events: 2020 Data Standards

How Do I record a Coordinated Entry Event?

- Next to the CE Event you've chosen, click the downward pointing arrow
- Enter the corresponding information
- Select save

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: 3RD STREET YOUTH ACCESS POINT

Enrollment History **Provide Services** Assessments Notes Files Forms ✕ Exit

Services

Document Ready	Coordinated Entry Event ▼
Failed Housing Outreach Attempt	RETIRED (Outreach Contact) ▼
Housing Application	Housing Search and Placement ▼
	RETIRED (Outreach Contact) ▼
	Housing Search and Placement ▼
	Coordinated Entry Event ▼
	Coordinated Entry Event ▼
	Coordinated Entry Event ▼
	RETIRED (Outreach Contact) ▼

Document Ready Coordinated Entry Event ▲

All Required Documents Posted for Housing Referral ▲

Start Date: 06/07/2020 📅 25 End Date: 06/07/2020 📅 25

Service Note

B *I* ☰ ☰

SUBMIT

Program Exits

Program Exits

1. Open the applicable client record. Click the “Programs” tab.
2. Click the edit button to the left of the Access Point Program Enrollment.
3. Select Exit

The screenshot displays a web application interface for managing client records. At the top, a dark navigation bar contains several tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, LOCATION, and REFERRALS. The 'PROGRAMS' tab is highlighted with a red box. Below this, a section titled 'PROGRAM HISTORY' contains a table with the following data:

Program Name	Start Date	End Date	Type
 ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency	03/06/2019	Active	Individual

Below the table, a section titled 'PROGRAM: ECS: BAYVIEW ACCESS POINT' is shown. It features a sub-navigation bar with tabs: Enrollment, History, Provide Services, Assessments, Notes, Files, and Forms. The 'History' tab is selected. On the right side of this section, there is a red-bordered button labeled 'X Exit'. Below the navigation bar, the text 'Program Service History' is displayed, followed by a message: 'There are no results to display'. A link labeled 'LINK FROM HISTORY' is located at the bottom right of the section.

Program Exits

4. The following exit screen will cascade open. Complete entries and select save

PROGRAM: ECS: BAYVIEW ACCESS POINT

Enrollment History Provide Services Assessments Notes Files Forms

End Program for client Will Wilson

Program Exit Date

Adult CE Program Referred to? A Program in the ONE System

Destination Data not collected

Adult CE Program Exit Destination Note:

MONTHLY INCOME AND SOURCES

Income from Any Source Data not collected

NON-CASH BENEFITS

Receiving Non-Cash Benefits Data not collected

HEALTH INSURANCE

Covered by Health Insurance Data not collected

SAVE CHANGES CANCEL

Helpful Resources



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING



415.429.4211



Submit a Request



Mailing List



Calendar

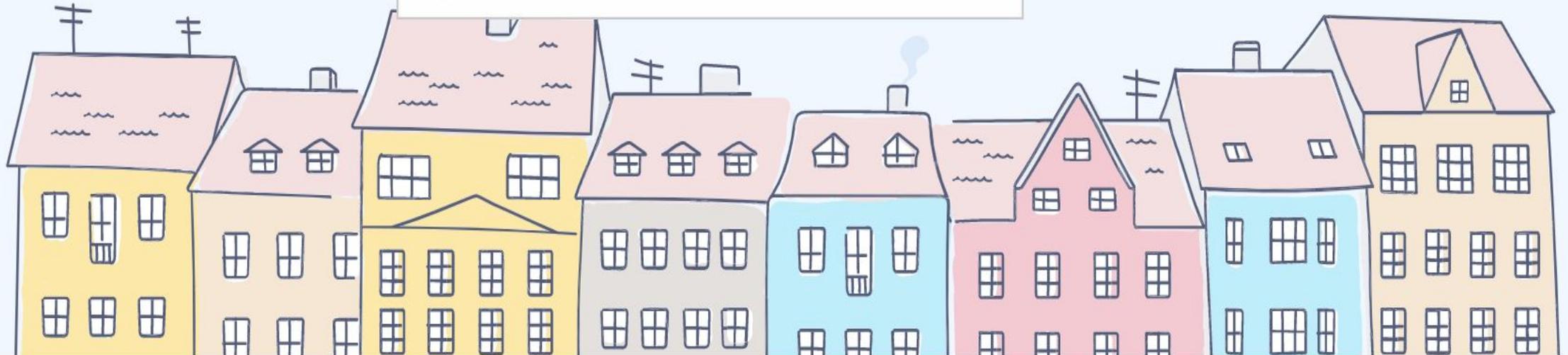


Sign In

MENU

OneSF Help Center

Search



Helpful Resources

Via our ONE SF web page you can find the following resources pertaining to today's training.

1. [Introduction to Coordinated Entry](#)
2. [2020 HMIS Data Standards: Coordinated Entry Data Elements Details](#)
3. [Additional Coordinated Entry Training Materials](#)
4. Copies of this training material will also be available

ONESF Help Center Website
<https://onesf.clarityhs.help>

Bitfocus Helpdesk
onesf@bitfocus.com

Thanks for joining us!



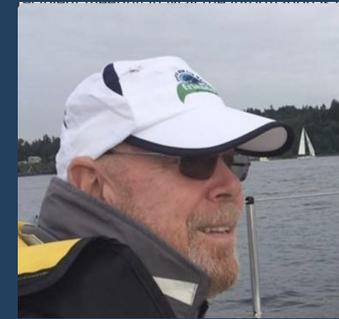
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