Smart Path HMIS Training

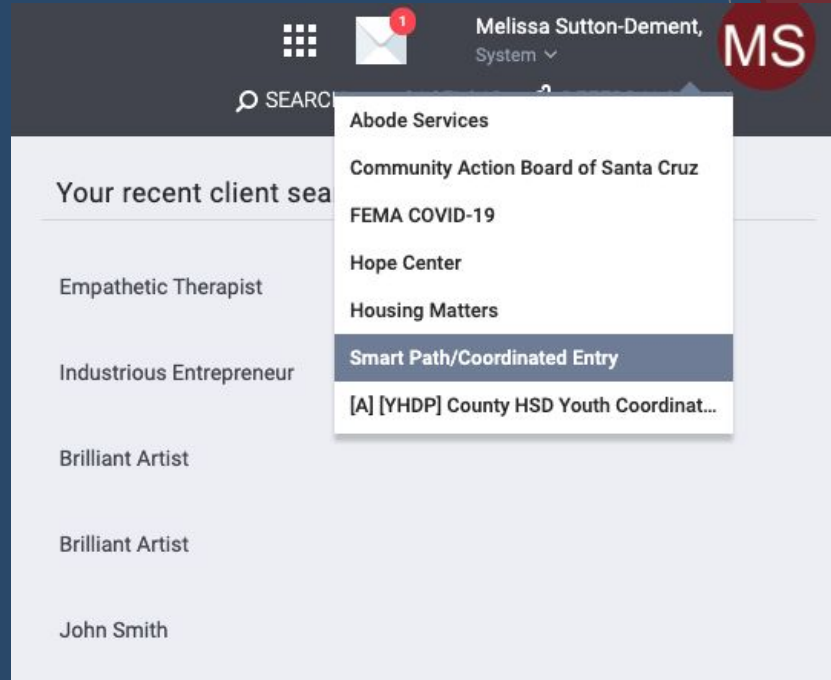## Santa Cruz County

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Agenda

- ► Switching Agencies
- ► Contact and Location Information
- ► CE Enrollment
- ► CE Events and Services
- ► Current Living Situation

- ► CE Assessment
- ► Referral to the CQ
- ► Uploading Documentation
- ► Exit
- ► Reports
- ► Resources

Switching Agencies

- Work related to Smart Path should be done under the Smart Path/Coordinated Entry Agency

- Users will need to switch agencies in Clarity

Update the Location Tab

- Location can be added manually or by using the GPS icon
- The active toggle should be turned on to indicate the client's current location

Update Contact Information

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

CLIENT CONTACTS   ADD CONTACT ⊕

- More than one contact can be added per client

ADD CONTACT

Contact Type	Client ⌄
Email	
Phone (#1)	XXX-XXX-XXXX
Phone (#2)	XXX-XXX-XXXX
Active Contact	●
Private	○
Contact Date	__/__/____ 📅
Note	B *I* ☰ ☰

SAVE CHANGES   CANCEL

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Smart Path Enrollment

- All clients who are eligible for Smart Path should be enrolled into a Smart Path program
  - HUD requirement
- Enrollments are completed to show that clients are actively being engaged in Smart Path
- Eliminates duplication of staff efforts and burden on the client

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Coordinated Entry Enrollment

Coordinated Entry Enrollment

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

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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 possile.

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CE Event Services

- ***NEW*** Required as part of the 2020 HUD Data Standards
- Services set up under the CE agency/program are categorized as CE Events
- ***Remember*** Every time a CE event is recorded, you must enter a Current Living Situation

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CE Event Services

Current Living Situation (CLS)

- ***NEW*** Required as part of the 2020 HUD Data Standards
- Used to regularly document the following:
  - The current living situation of people experiencing homelessness
  - Homeless chronicity
- When entered by shelter staff or outreach staff, it can be used as a homeless verification.

Current Living Situation

For Coordinated Entry, record a CLS anytime any of the following occurs:

1. Project Start (enrollment into CE program)
2. A CE Assessment or CE Event is recorded; or
3. The client's living situation changes

Current Living Situation Assessment

Current Living Situation Assessment

Add Current Living Situation for client Pita Pocket

Additional questions may populate based on the client's responses

Date of Contact	10/14/2019
Current Living Situation	Hospital or other residential non-psychiatric medical facility
Living Situation Verified By	ECS: Bayview Access Point
Is client going to have to leave their current living situation within 14 days?	Yes
Has a subsequent residence been identified?	Select
Does individual or family have resources or support networks to obtain other permanent housing?	Select
Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days?	Select
Has the client moved 2 or more times in the last 60 days?	Select
Location Details	

CE Assessment

CE Assessment

- Evaluates a client's possible health vulnerability, housing barriers, and homelessness chronicity
- Determines prioritization for housing resources
- Does NOT guarantee eligibility for a housing resource

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CE Assessment

- Prior to completing an assessment, **check the client's History or profile screen** to see if they have already completed an assessment
- If the client has been exited from CE, you need to re-enroll them prior to completing the assessment

CE Assessment

*The assessment has not changed, it is just located in a new place

CE Assessment

- ***NEW*** There are two new HUD 2020 Data Standards fields that will be on the CE Assessment
    - Location- *this was updated to match the HUD standards*
    - Assessment Type

CE Assessment

Assessment Date 08/28/2019

Complete the fields of the assessment being as thorough as possible (try to avoid using data not collected)

ADULT HOUSING ASSESSMENT

1) Where did you stay last night? (Living situation, not geography) — Select

2) In the place you are staying, are you experiencing physical or sexual violence? — Select

3) How long have you been homeless this time? — Select

THE REMAINING FIELDS ARE USED FOR STATISTICAL PURPOSES (NO INPUT NECESSARY)

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)? — Select

5) How long in total have you lived in an emergency shelter or place not meant for people to sleep, including today? (Over lifetime) — Select

6) How many times in the past three years have you lived in a shelter, outdoors, in a vehicle, or other place not meant for people to live? (each break in homelessness has to span at least 7 consecutive nights) — Select

7) How old were you when you first experienced homelessness (living in shelter, outdoors, in a vehicle or other place not mean for people to live)? — Select

8) Do you have one of the following disabling conditions, or been told you have one of the following by a healthcare provider: Physical disability, developmental disability, chronic health condition, HIV/AIDS, mental health problem, substance abuse? — Select

9) Do you have any challenges that cause you to need help with daily activities or help with maintaining housing (e.g. a serious medical condition, mental health problem, substance problem, other issue)? — Select

10) How many times have you used crisis services in the past year (for example, mental health crisis services, hospital, detox, suicide prevention hotline)? — Select

SAVE   CANCEL

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Referral to the Community Queue

Referral to the Community Queue

REFERRAL: ADD TO CQ

Send to Queues	Family Shelter Queue
Referred Program	Community Queue
Referred to Agency	Community Queue
Referring Agency	Marin County Training Agency
Private	(toggle off)

Notes are optional

SEND REFERRAL   CANCEL

Uploading Documents

Uploading Documents

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

1

CLIENT FILES

ADD FILE ⊕

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	◯

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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

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Exits

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Exits

- Assessor and Matchmaker staff are responsible for exiting clients from the CE program
- Client should be exited from CE for the following reason:
  - The client has entered a permanent residential project type or is otherwise known to have found permanent housing
    - A client is automatically exited from CE when a client has a move-in date recorded or destination for a permanent housing destination
  - The client is known to have left the CoC to pursue other assistance
  - The client is deceased
  - Client has declined all services

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Exits

Recap of CE Data Standards Elements

Remember...

A Current Living Situation must be recorded when you:

- Enroll the client
- Enter a VI-SPDAT
- Enter a Service

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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

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

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

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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

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
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]

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