

Smart Path HMIS Training

Santa Cruz County

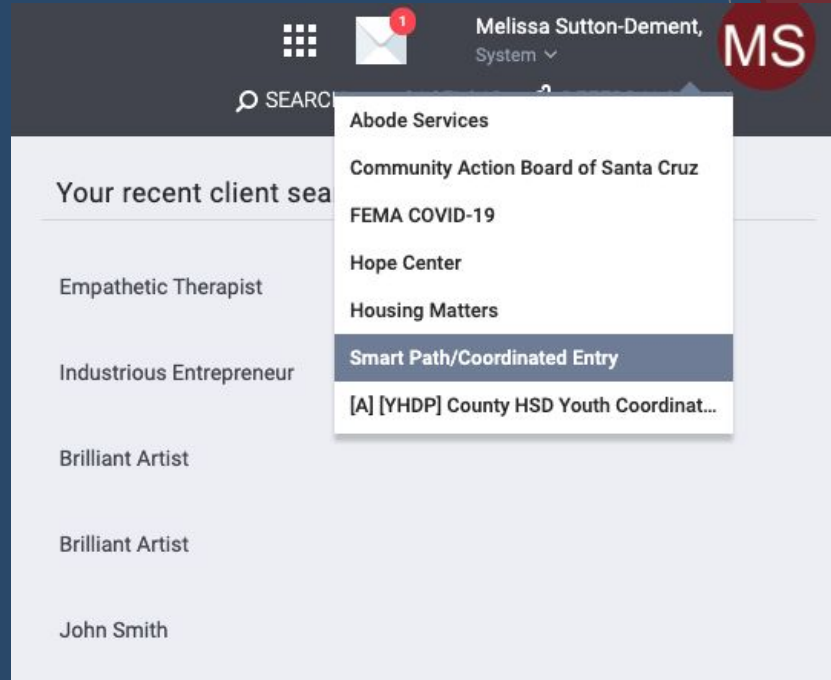


Agenda

- ▶ 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

The screenshot shows the Bitfocus web application interface. At the top, a navigation bar contains the following menu items: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, and LOCATION. The 'LOCATION' tab is highlighted with a red box. Below the navigation bar, the main content area is titled 'CLIENT LOCATION'. On the right side of this area, there is a button labeled 'ADD ADDRESS' with a plus sign and a location pin icon, also highlighted with a red box. Below the 'CLIENT LOCATION' header, there is a map on the left and a form titled 'ADD CLIENT LOCATION' on the right. The form contains the following fields and controls:

- Address Type:** A dropdown menu with 'Home' selected.
- Name:** A text input field with a calendar icon on the right.
- Address (line 1):** A text input field.
- Address (line 2):** A text input field.
- City:** A text input field.
- State:** A dropdown menu with 'Alabama' selected.
- Zip Code:** A text input field with a hyphen in the middle.
- Location Date:** A date picker field with a calendar icon on the right.
- Active Location:** A toggle switch that is currently turned on (blue).
- Private:** A toggle switch that is currently turned off (grey).
- Note:** A text area with a rich text editor toolbar containing icons for Bold (B), Italic (I), Bulleted List, and Unordered List.

- 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


Email

Phone (#1)

Phone (#2)

Active Contact

Private

Contact Date 

Note

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Managed with Clarify Human Services

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

Coordinated Entry Enrollment

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


PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Program A-Emergency Shelter (nbn) Emergency Shelter: Night-by-Night New User Training Agency ⓘ	03/31/2020	Active	Individual

PROGRAMS: AVAILABLE

Smart Path and Coordinated Entry ^

Active Clients




21
CLIENTS

0 % Families
100 % Individuals

Funding Source
HUD:CoC - Supportive Services Only

Service Categories:
✓ Coordinated Entry Event


Availability
Full Availability

 PRINT DIRECTIONS ENROLL





Coordinated Entry Enrollment


Enroll Program for client Freddy Fox


Program Entry Date 08/27/2019 


DISABLING CONDITIONS AND BARRIERS


Disabling Condition 


Physical Disability 


Developmental Disability 

Chronic Health Condition 


HIV - AIDS 

Mental Health Problem 


Substance Abuse Problem 

Victim of Domestic Violence 


CASH INCOME FOR INDIVIDUAL

Income from Any Source 


NON-CASH BENEFITS

Receiving Non-Cash Benefits 

HEALTH INSURANCE

Covered by Health Insurance 

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 possible.

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

CE Event Services

PROGRAM: SMART PATH AND COORDINATED ENTRY

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

Services

Financial Assistance Coordinated Entry Event ▾

Housing Problem Solving (HPS) Services Coordinated Entry Event ▾

Referrals Coordinated Entry Event ▾

Behavioral Health (Mental Health/Substance Use Disorder) Services ⤴

Start Date: 07/13/2021 📅 End Date: 07/13/2021 📅

Result: Client housed/re-housed in a safe alternative: Select ▾

Include group members:

Industrious

Entrepreneur

Service Note :

B *I* U **A**

SUBMIT



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

The screenshot displays a web application interface for a 'Current Living Situation Assessment'. At the top, a navigation menu includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS' (highlighted with a red box), 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', and 'LOCATION'. Below the menu is a yellow warning banner: '⚠ Release of Information is Missing or Permission Not Provided. Please review to ensure compliance (Click here)'. The main content area is titled 'PROGRAM HISTORY' and shows a selected program: 'PROGRAM: ECS: BAYVIEW ACCESS POINT'. To the left, a sidebar identifies the program as 'Coordinated Entry Program' under 'Marin County Coordinated Entry Agency'. A sub-menu for this program includes 'Enrollment', 'History', 'Provide Services', 'Assessments' (highlighted with a red box), 'Notes', 'Files', 'Forms', and an 'Exit' button. The 'Assessments' section lists 'Current Living Situation' as the active assessment. A 'LINK FROM ASSESSMENTS' section contains a 'START' button (highlighted with a red box). A modal window titled 'ADD PROGRAM ASSESSMENT' is open, showing a radio button selected for 'Pita Pocket' and 'Grandchild', with an 'ADD CURRENT LIVING SITUATION' button (highlighted with a red box) at the bottom.

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 <input type="text"/>
Living Situation Verified By	ECS: Bayview Access Point <input type="text"/>
Is client going to have to leave their current living situation within 14 days?	Yes <input type="text"/>
Has a subsequent residence been identified?	Select <input type="text"/>
Does individual or family have resources or support networks to obtain other permanent housing?	Select <input type="text"/>
Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days?	Select <input type="text"/>
Has the client moved 2 or more times in the last 60 days?	Select <input type="text"/>
Location Details	<input type="text"/>

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

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


The screenshot shows a web application interface with a navigation menu at the top containing: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION. The 'HISTORY' tab is selected. Below the navigation is a 'HISTORY' header. Underneath is an 'Advanced Search Options' section with a 'View' dropdown. A table displays assessment records with columns for Service Name, Start Date, and End Date. The second record, 'VI-SPDAT Prescreen for Single Adults [V2]' by 'Mary Test-10 Agency', is highlighted with a red border. The 'End Date' for this record is '06/02/2020'. The first record, 'Emergency Shelter w/ Reservations' by 'Adam Test Agency', has a start date of '06/08/2020' and a status of 'Active'.

Service Name	Start Date	End Date
Emergency Shelter w/ Reservations Adam Test Agency ⓘ	06/08/2020	Active
VI-SPDAT Prescreen for Single Adults [V2] Mary Test-10 Agency ⓘ		06/02/2020

CE Assessment

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

PROGRAM HISTORY

Program Name	Start Date	Enrollment
 Smart Path and Coordinated Entry Coordinated Entry Smart Path/ Coordinated Entry ⓘ Edit	08/17/2021	Ac

PROGRAM: SMART PATH AND COORDINATED ENTRY

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

Assessments

LINK FROM ASSESSMENTS

Current Living Situation	START
Status Update Assessment	START
Annual Assessment	START
Smart Path & CTA Copy of VI-F-SPDAT Prescreen for Families [V2]	START
Smart Path & CTA Copy of VI-SPDAT Prescreen for Single Adults [V2]	START
Smart Path & CTA Copy of VI-Y-SPDAT Prescreen for Transition Age Youth	START

*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

Assessment Location	Select	▼
Assessment Type	Select	▼
Interviewer Name		🗑

Assessment Type	▼ ✓ Select Phone Virtual In person	▼
Interviewer Name		🗑

CE Assessment

ADULT PRIMARY 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	
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	▼

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

SAVE

CANCEL

Referral to the Community Queue

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

PROGRAM: SMART PATH AND COORDINATED ENTRY

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

PROGRAM ELIGIBILITY DETERMINATION

VI-SPDAT-V2 Score Summary

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	1	RISKS	2
SOCIALIZATION & DAILY FUNCTION	3	WELLNESS	4

VI-SPDAT-V2 PRE-SCREEN TOTAL 10

REFER DIRECTLY TO COMMUNITY QUEUE

Category -- All Categories -- Agency -- All Agencies -- Availability -- All --

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	<input type="checkbox"/>

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Notes are optional

SEND REFERRAL **CANCEL**

Uploading Documents



Uploading Documents

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

CLIENT FILES ADD FILE +

There are no results to display

UPLOAD A FILE

Category Background Check

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

File

Trouble attaching files? [Switch to the Basic Uploader](#)

Private

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

Exits



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

Exits

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

PROGRAM HISTORY

Program Name

Start Date

End Date

Type

 Coordinated Entry Program (Marin)

Coordinated Entry

07/06/2020

Active

Individual

Emergency Shelter w/ Reservations

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

× Exit

Program Service History

LINK FROM HISTORY

Service Name

Start Date

End Date

Problem Solving :Initiated Problem Solving Conversation
[TRAINING] San Francisco Adult Coordinated Entry Agency

10/15/2019 10/15/2019

Reservation Service Referral



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

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

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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HUMAN SERVICES

