


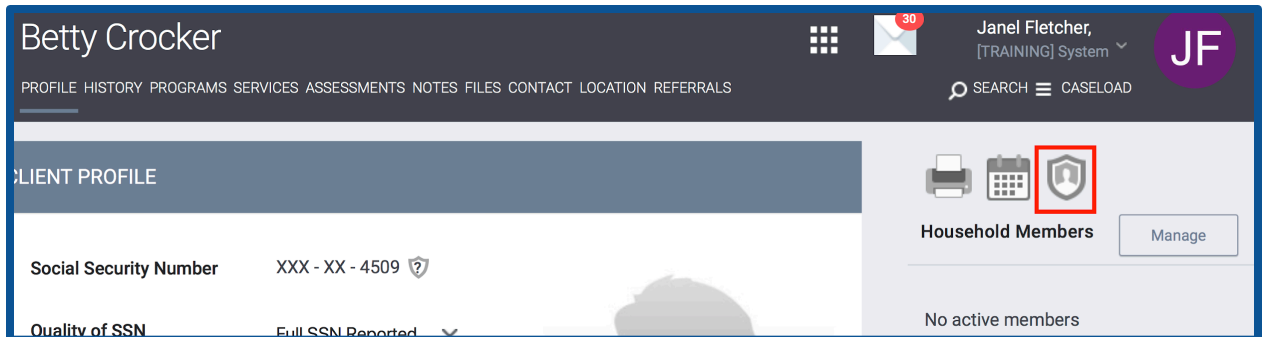
The purpose of this workflow document is to show the new steps to record a Coordinated Assessment starting July 1st, 2020. Assessment Only agencies are now required to complete a minimal Coordinated Entry program enrollment and to record the Current Living Situation assessment for folks who complete a Coordinated Assessment (VI-SPDAT or VI-F-SPDAT) at their agency. This workflow will begin with a refresher on how to review the ROI prior to entering data in HMIS.

I. First, search for the person and Review the Release Of Information (ROI).

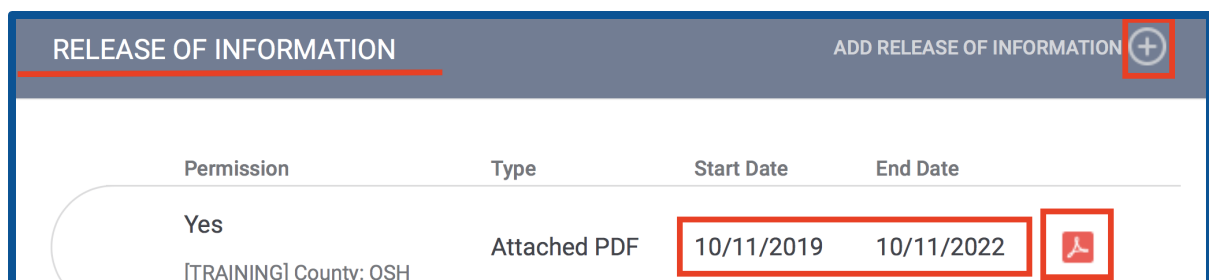
- 1) Always search for the person prior to creating a new client record. This will prevent duplicates in the system. Individuals can be searched by typing partial first name, last name, social security number (xxx-xx-xxxx or last 4 digits), or date of birth (mm/dd/yyyy).




- 2) If the person appears, click the shield icon to review the attached PDF ROI.



- 3) In the Release of Information section of the screen, open the PDF and review the boxes initialed by the individual. The boxes initialed by this person identifies what information they consent to have entered in HMIS. If a box is not initialed by the person, they do not consent to having that information entered. Double check expiration date on the PDF ROI matches the expiration date in Clarity.

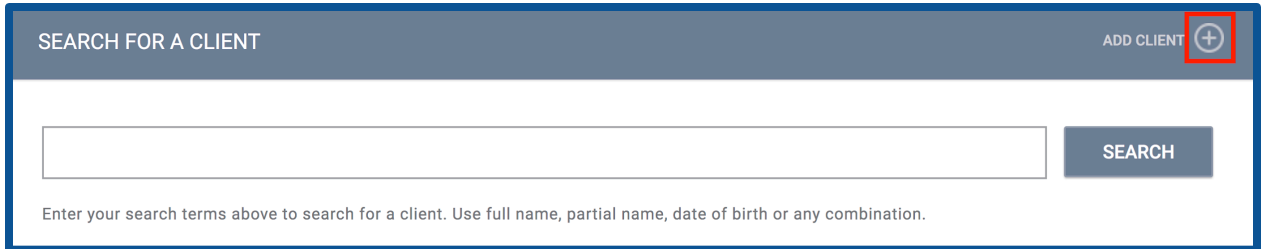


Permission	Type	Start Date	End Date	
Yes	Attached PDF	10/11/2019	10/11/2022	

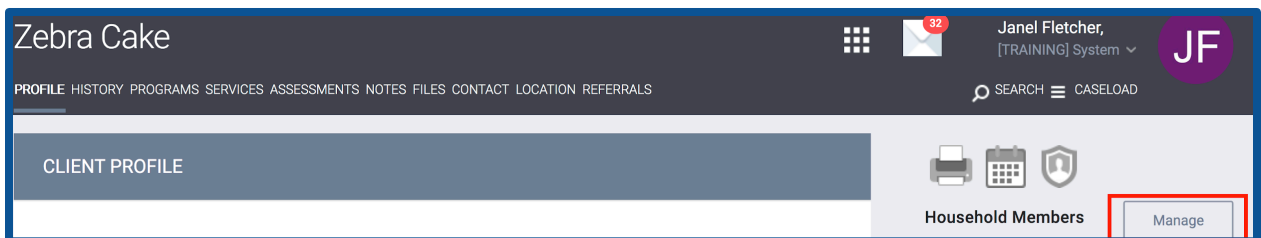
[TRAINING] County: OSH

II. Configure the Household.

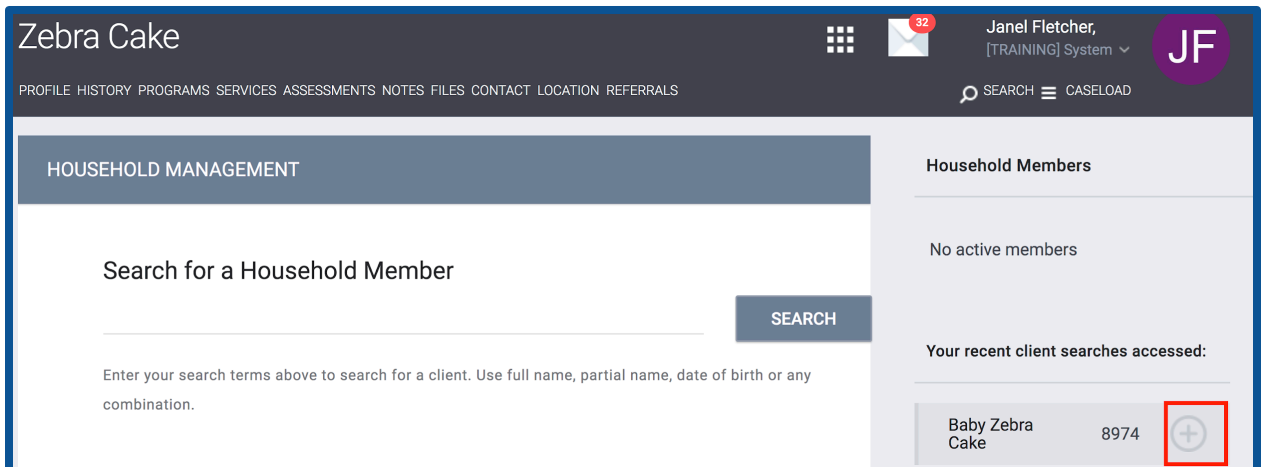
- 4) Complete these steps for every member of the household so that each person has a profile created and an ROI uploaded. Select ADD CLIENT to add individuals that did not appear during your search.



- 5) From the Head of Household's profile, select MANAGE on the right side of the screen.




- 6) Next, choose a family member under the Your recent client searches accessed section to add to the household. A plus sign will appear when you move your mouse to the right of the family member's name.



- 7) Select the Member type of the person you just selected (ex: Child), and click Save (screenshot 1). Next, update the member type for the Head of Household (HoH) by moving your mouse to the right so the edit symbol will appear (screenshot 2). Note, the

HoH has a star next to their member type. If you have the wrong person as HoH, you can also update the HoH here (screenshot 3), and save. Once the family is configured each member will appear with the member type and as in screenshot 4.

ADD TO HOUSEHOLD 


1


Member Type

Start Date

- ✓ Not Set
- Husband
- Wife
- Daughter
- Son**
- Father
- Mother
- Sister
- Brother

Household Members **2**


Zebra Cake	Not Set ★ 
Baby Zebra Cake	Son

EDIT GLOBAL HOUSEHOLD 

3

Member Type Father ▼

Head of Household Zebra Cake ▼

Joined Household 03/04/2020 

Exited Household ☐

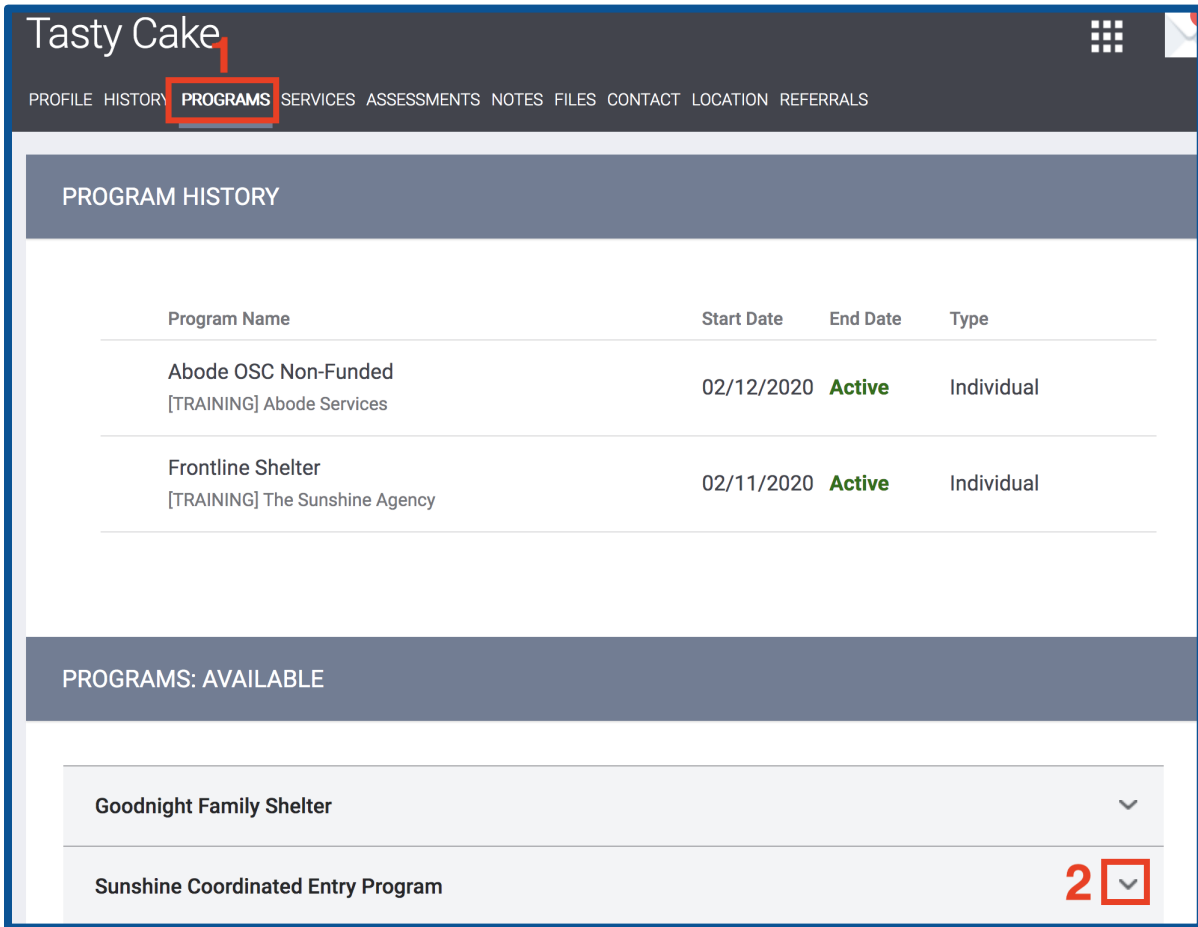
SAVE

Household Members **4**

Zebra Cake	Father ★
Baby Zebra Cake	Son

III. Next, enroll into the Coordinated Entry Program.

- 8) As in the numbered screenshots below, (1) click on the Programs tab, next, (2) click on the agency coordinated entry program [AGENCY NAME] Coordinated Entry, and (3) toggle on minor children in the household and click enroll (4). Note households of more than one adult should not toggle on the group member. **Separate enrollments should be completed for families with only adults in the household.** Complete the questions that appear on the enrollment screen and save (not pictured).

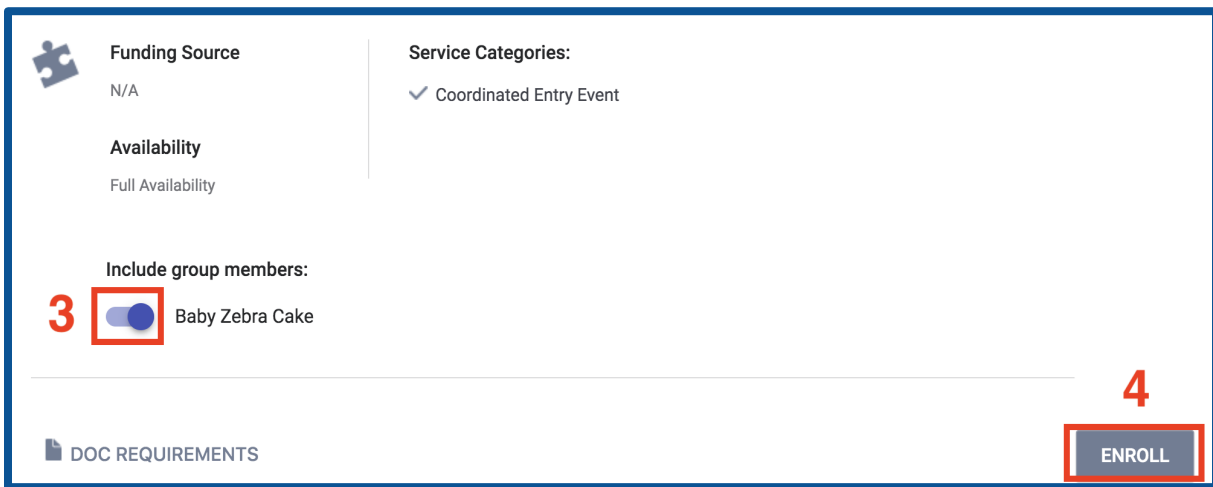


The screenshot shows the Tasty Cake web application interface. At the top, the 'PROGRAMS' tab is highlighted with a red box and a red '1'. Below the navigation bar, the 'PROGRAM HISTORY' section displays a table with two rows of active programs. Below this, the 'PROGRAMS: AVAILABLE' section shows a list of programs, with 'Sunshine Coordinated Entry Program' highlighted by a red box and a red '2'.

Program Name	Start Date	End Date	Type
Abode OSC Non-Funded [TRAINING] Abode Services	02/12/2020	Active	Individual
Frontline Shelter [TRAINING] The Sunshine Agency	02/11/2020	Active	Individual

Programs: Available
Goodnight Family Shelter
Sunshine Coordinated Entry Program

After enrolling the client in the program, you will arrive on the program enrollment menu. This



Funding Source
N/A

Availability
Full Availability

Service Categories:
✓ Coordinated Entry Event

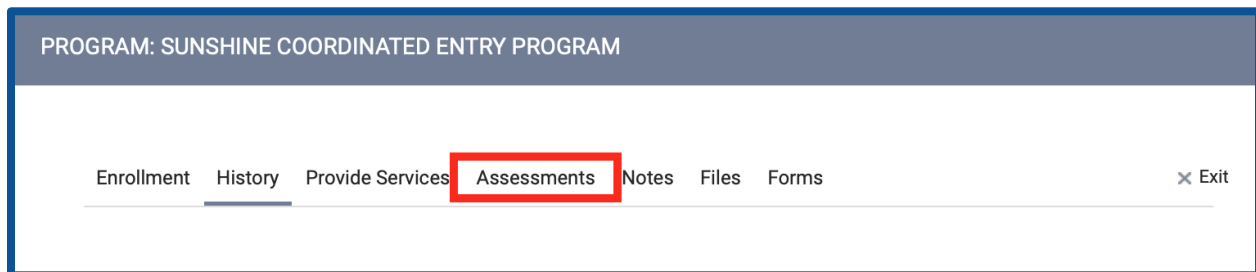
Include group members:

3 ☒ Baby Zebra Cake

4 **ENROLL**

DOC REQUIREMENTS

menu will allow you to record the Coordinated Entry Assessment (VI-SPDAT and VI-F-SPDAT) and the Current Living Situation assessment. Select the Assessments tab to view these assessments.



PROGRAM: SUNSHINE COORDINATED ENTRY PROGRAM

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

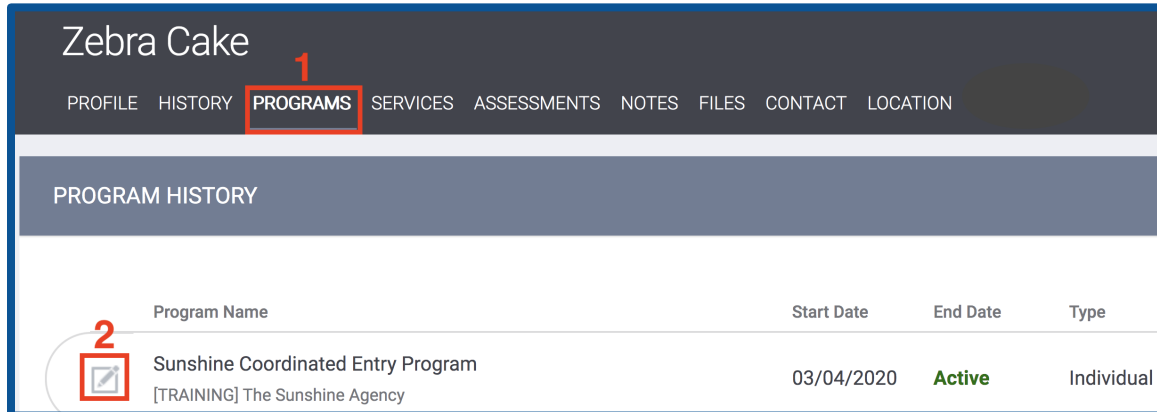
III. Record the Current Living Situation and Coordinated Entry Assessments

Living situations are used to understand how many times a person is engaged while experiencing homelessness and can also be used to document homeless chronicity and risk of imminent homelessness.

When to record the Current Living Situation Assessment:

Coordinated Entry assessors are expected to record every direct contact made with each client in the HMIS via data element 4.12, Current Living Situation. ([HUD 2020 HMIS Data Standards Manual - Version 1.6](#)).” In HMIS, this is the Current Living Situation Assessment.

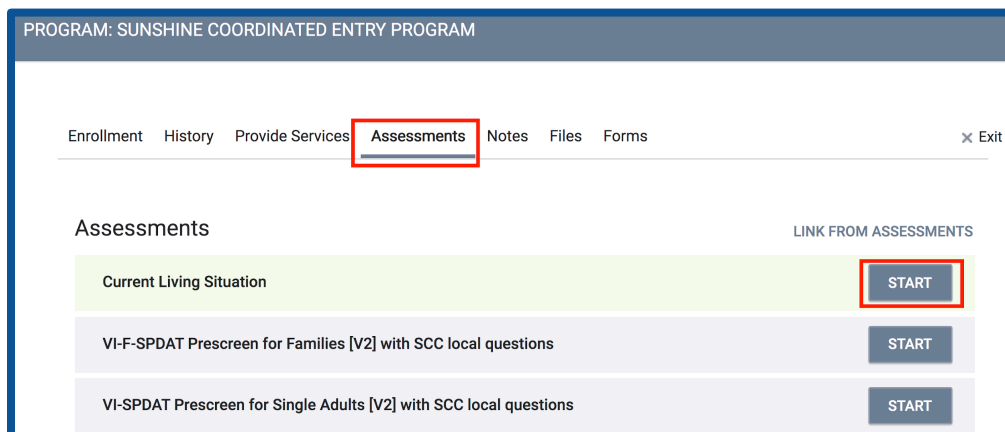
- 9) At enrollment and every time a person returns to your agency, open the program enrollment to record the Current Living Situation Assessment.



The screenshot shows the Zebra Cake interface. The top navigation bar includes tabs for PROFILE, HISTORY, PROGRAMS (highlighted with a red box and a red '1'), SERVICES, ASSESSMENTS, NOTES, FILES, CONTACT, and LOCATION. Below this is the PROGRAM HISTORY section. A table lists programs with columns for Program Name, Start Date, End Date, and Type. The first row shows the 'Sunshine Coordinated Entry Program' with a start date of 03/04/2020, status 'Active', and type 'Individual'. A red box with a red '2' highlights the program name and its associated icon.

Program Name	Start Date	End Date	Type
Sunshine Coordinated Entry Program [TRAINING] The Sunshine Agency	03/04/2020	Active	Individual

- 10) Next, click on the Assessments Tab and click START on the Current Living Situation assessment. Complete the Assessment questions and save.



The screenshot shows the 'PROGRAM: SUNSHINE COORDINATED ENTRY PROGRAM' interface. The top navigation bar includes tabs for Enrollment, History, Provide Services, Assessments (highlighted with a red box), Notes, Files, and Forms. Below this is the Assessments section. A table lists assessments with columns for the assessment name and a 'START' button. The first row is 'Current Living Situation' with a 'START' button highlighted by a red box. The other two rows are 'VI-F-SPDAT Prescreen for Families [V2] with SCC local questions' and 'VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions', both with 'START' buttons.

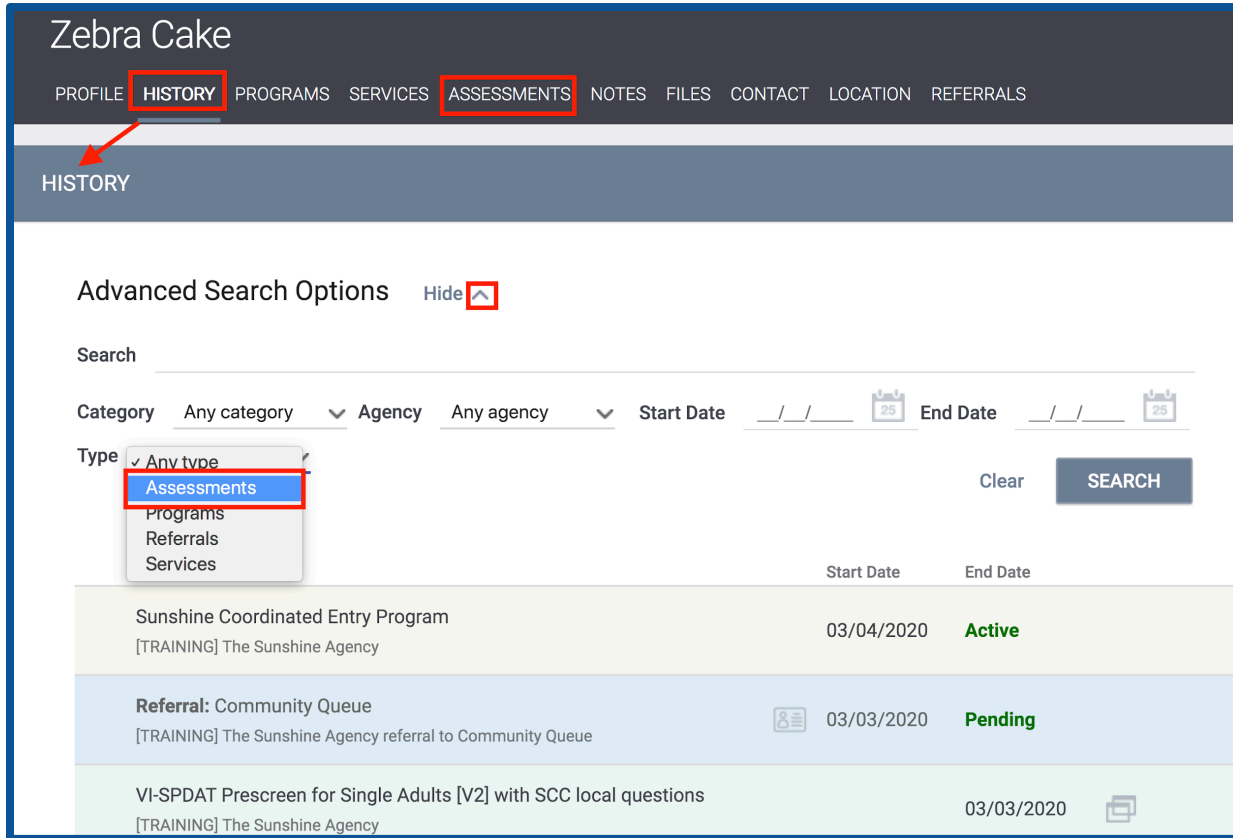
Assessments	LINK FROM ASSESSMENTS
Current Living Situation	START
VI-F-SPDAT Prescreen for Families [V2] with SCC local questions	START
VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions	START

When to record

the Coordinated Entry Assessment:

Coordinated Entry Assessments (VI-SPDAT/VI-F-SPDAT) should be recorded every 365 days for someone currently experiencing homelessness. **Please do not record a new assessment before 365 days unless someone experiences a significant change since their last assessment.**


- 11) Check to see if a person has an assessment recorded by clicking the client level History or Assessment tab. History tab pictured below.



Zebra Cake

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

HISTORY



Advanced Search Options Hide 

Search

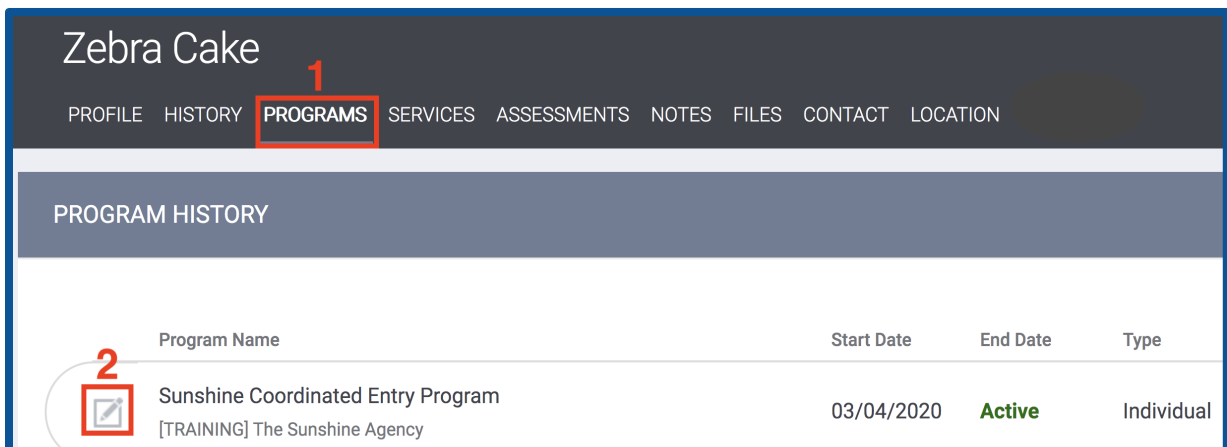
Category Any category Agency Any agency Start Date End Date

Type ☒ Any type **Assessments** Programs Referrals Services

Clear **SEARCH**

	Start Date	End Date
Sunshine Coordinated Entry Program [TRAINING] The Sunshine Agency	03/04/2020	Active
Referral: Community Queue [TRAINING] The Sunshine Agency referral to Community Queue	 03/03/2020	Pending
VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions [TRAINING] The Sunshine Agency	03/03/2020	


12) If the person does not have an assessment completed in the time frame, record a new assessment in the program. From the profile screen, click on programs (1) and open the program enrollment (2).



Zebra Cake

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

PROGRAM HISTORY

	Program Name	Start Date	End Date	Type
2 	Sunshine Coordinated Entry Program [TRAINING] The Sunshine Agency	03/04/2020	Active	Individual

13) Next, click on the Assessments Tab, complete the Coordinated Entry Assessment(VI-SPDAT/ VI-F-SPDAT) and save.
 14) Refer the person to the Community Queue if they score a 4 or higher on the assessment.

PROGRAM ELIGIBILITY DETERMINATION

VI-SPDAT-V2 Score Summary

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	0	RISKS	4
SOCIALIZATION & DAILY FUNCTION	2	WELLNESS	6
VI-SPDAT-V2 PRE-SCREEN TOTAL		12	

REFER DIRECTLY TO COMMUNITY QUEUE

VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions

START