Coordinated Entry in CMIS/HMIS

Clarity Human Services Training

May, 2023

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Agenda

1. Welcome & Introductions
2. Overview of updated Rural Nevada Coordinated Entry Policy and Procedures
3. Overview of Coordinated Entry Process in Clarity Human Services
    - CE Project Enrollment
    - Assessments: Current Living Situation
    - CE Assessor Workflow & Referral to the Queue
    - CE Events
    - CE Exits
    - Staying Active on the Queue
4. Recap
5. Demo in Clarity
6. FAQs / Resources / Q&A

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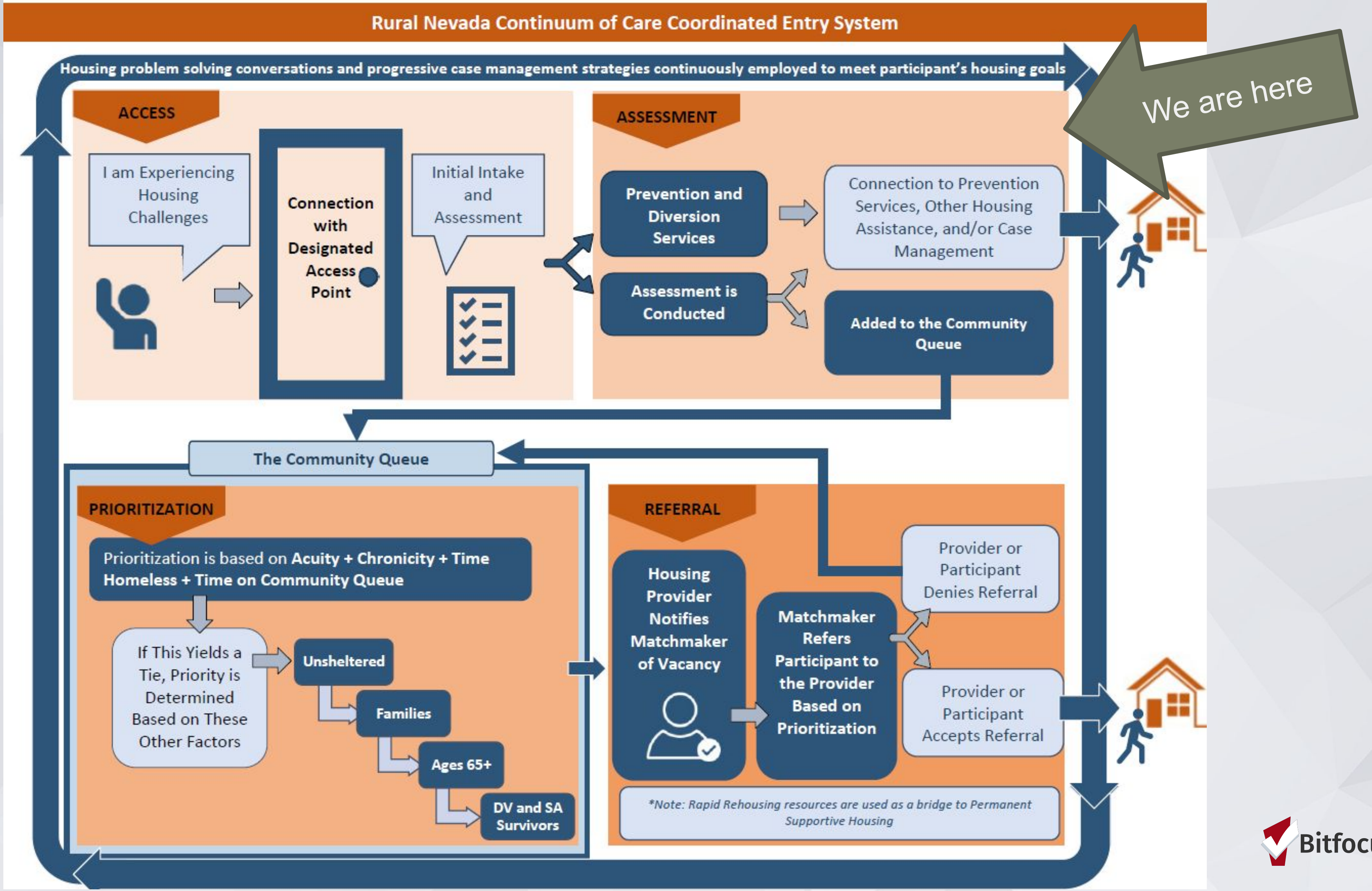

Rural Nevada Continuum of Care Coordinated Entry System
Housing problem solving conversations and progressive case management strategies continuously employed to meet participant's housing goals
We are here
ACCESS
I am Experiencing Housing Challenges
Connection with Designated Access Point
Initial Intake and Assessment
ASSESSMENT
Prevention and Diversion Services
Connection to Prevention Services, Other Housing Assistance, and/or Case Management
Assessment is Conducted
Added to the Community Queue
The Community Queue
PRIORITIZATION
Prioritization is based on Acuity + Chronicity + Time Homeless + Time on Community Queue
If This Yields a Tie, Priority is Determined Based on These Other Factors
Unsheltered
Families
Ages 65+
DV and SA Survivors
REFERRAL
Housing Provider Notifies Matchmaker of Vacancy
Matchmaker Refers Participant to the Provider Based on Prioritization
Provider or Participant Denies Referral
Provider or Participant Accepts Referral
*Note: Rapid Rehousing resources are used as a bridge to Permanent Supportive Housing

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Coordinated Entry is Designed to Ensure that…

All people experiencing a housing crisis have **fair and equal access** to the system's resources and are **quickly identified, assessed for, and connected** to housing and homeless services based on their strengths and needs. It uses **standardized tools and practices**, incorporates a system-wide Housing First (no barriers to entry) approach, and, in an environment of scarce resources, **coordinates housing support so that those with the most severe service needs are prioritized.**

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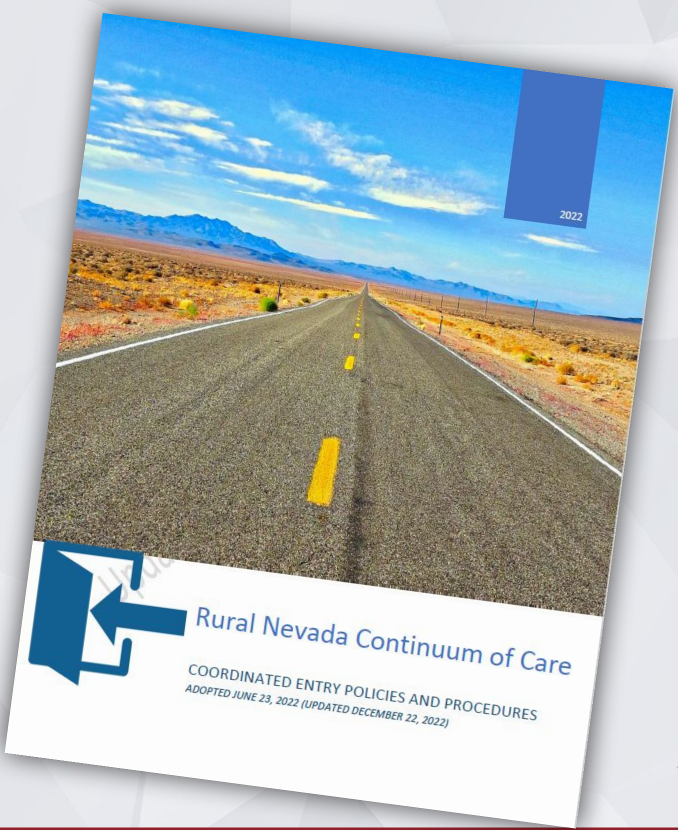
Coordinated Entry Policies and Procedures



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Guiding Principles of Coordinated Entry

- Streamlined access and referral
- Fair and equal access
- Standardized tools and practices
- A barrier free approach (Housing First)
- Prioritization of those most in need

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Core Element: Access

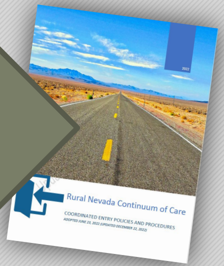
Designated access points across the CoC

Outreach and referrals

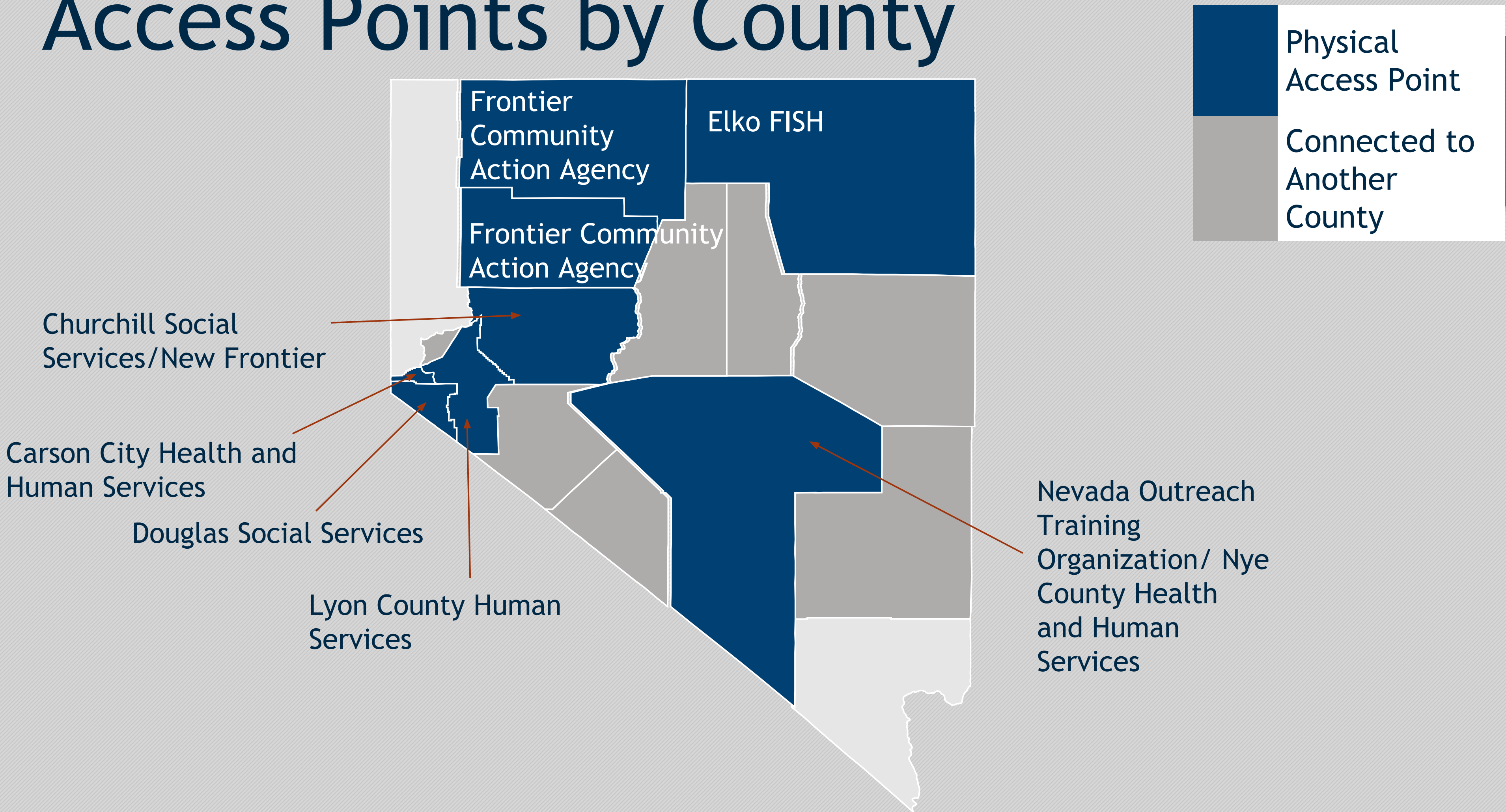
Affirmative marketing for the CES

Fair and equal access to information and services

Pages 6, 20-22



Access Points by County



Core Element: Assessment

Person-centered

Culturally and linguistically competent administration

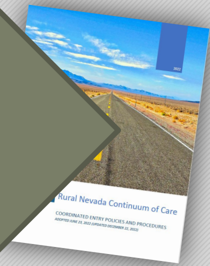
Build participant trust and safety

Initial Assessment Tool: SATT

CHAT

Assessment Process and Scoring

Pages 17, 23-26



Assessment: Best Practices

- Person-Centered
  - Focused on resolving the person’s needs
  - Strengths-based
  - Sensitive to trauma
- Culturally and Linguistically Competent
  - Sensitive to lived experiences
  - In the preferred language
- Private
- Safe area

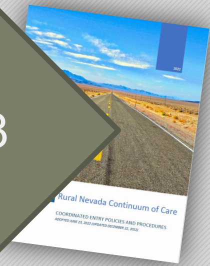
Core Element: Prioritization

Community Queue

Prioritization Scheme

Agency Roles and Responsibilities

Pages 27-28



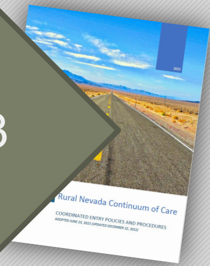
Community Queue

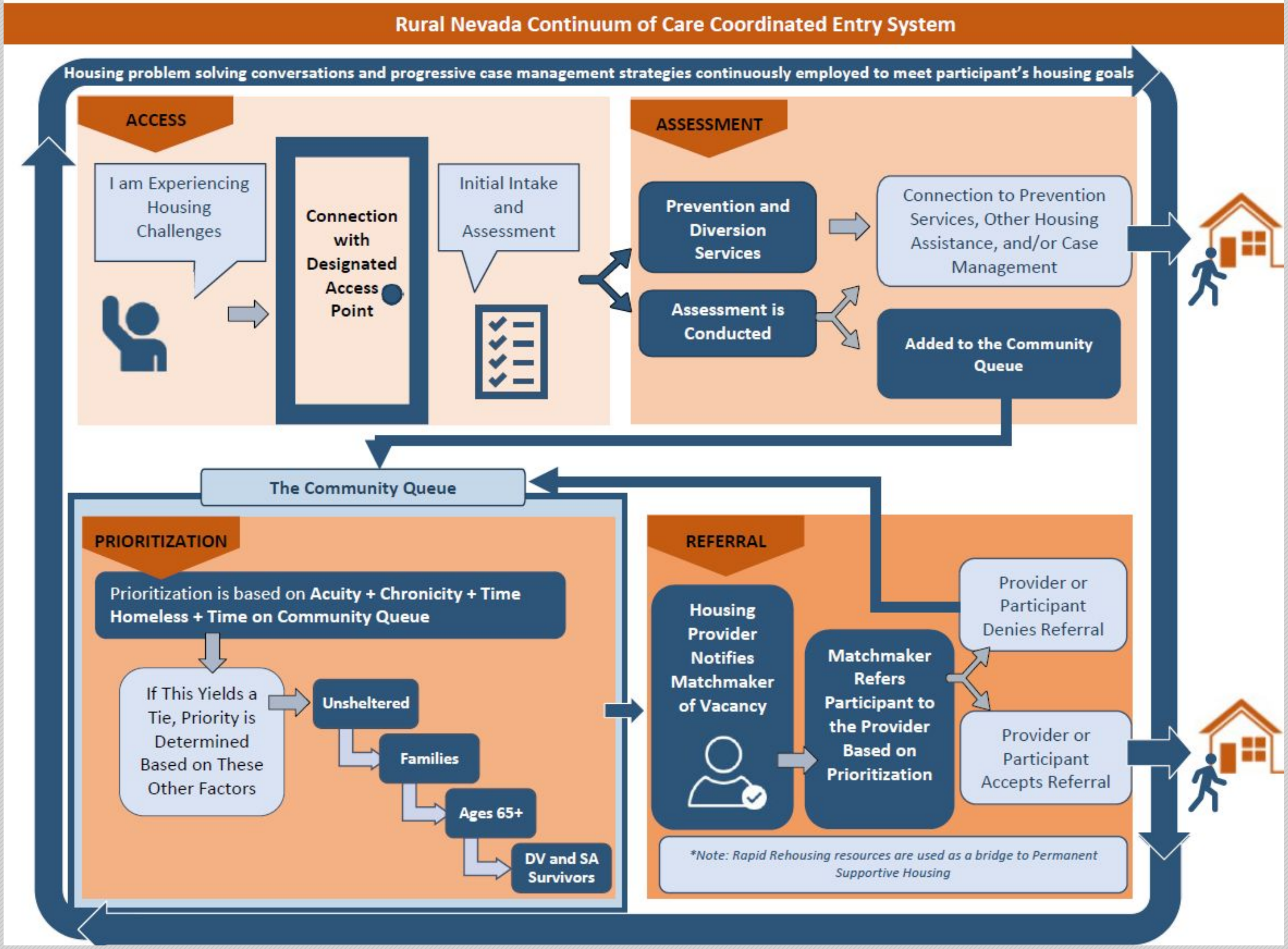
- A prioritized list based on a set of criteria defined by the CoC
- Prioritization determined by assessment score plus additional CoC-defined criteria
- Must be used to fill all project vacancies
- Closes the side doors to the homeless system that people might have used in the past
- Establishes norms for equitable referrals across providers

Core Element: Referral

- Matchmaker
- Notification of Vacancy
- Referral Process
- Eligibility Determination
- Support to Find Housing

Pages 28-33

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Coordinated Entry Process

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Coordinated Entry Process

1) Switch to the appropriate Coordinated Entry Agency
2) Search for the client
3) Enroll the client in the CE Project
4) Complete the Current Living Situation Assessment
5) Complete the SATT Crisis Assessment and refer the client directly to shelter
6) Follow the prompt at the end of the SATT Crisis Assessment to direct your next step with the client.

   The most common next step will be to complete the CHAT Housing Assessment and refer to the queue.

7) Provide the client with the Coordinated Entry Event service(s) throughout their engagement in the Coordinated Entry system.

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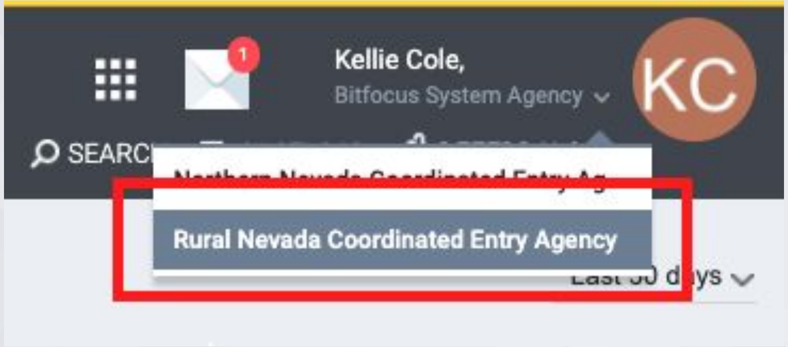
Coordinated Entry Project Enrollment

CE Project Enrollment: **Overview**

- All CE activities should be recorded within a program enrollment.
- An enrollment indicates a client's initial engagement in the coordinated entry process.
- If a client is exited from coordinated entry and returns to homelessness, a new enrollment should be entered.

CE Project Enrollment:
Switching Agencies

- Users will switch to the appropriate Coordinated Entry Agency before adding a new enrollment
- For Rural Nevada:
  - Rural Nevada Coordinated Entry Agency



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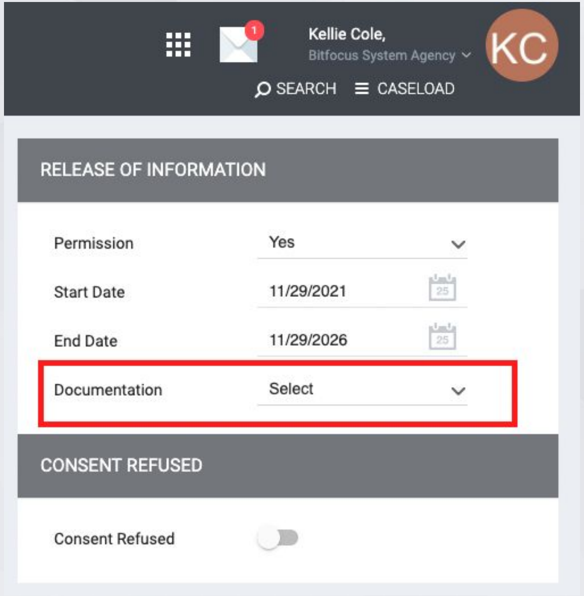
CE Project Enrollment:
ROI and Profile Creating

After switching to the Rural Nevada Coordinated Entry Agency, search for the client

- If found, **ensure the client has a Release of Information (ROI)**
- If not found, create a profile for the client and **document the ROI**



Make Sure an ROI is completed

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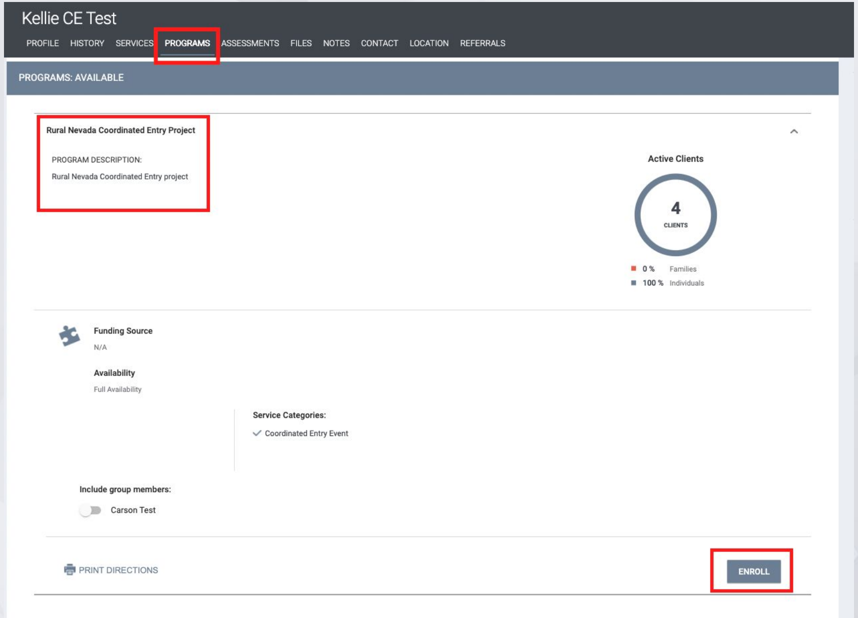
CE Project Enrollment:
Enrolling the Client

Enroll the Client into the CE Program

- Click on *Programs* in the top bar
- Then, under the dropdown arrow in the CE Program, click enroll.



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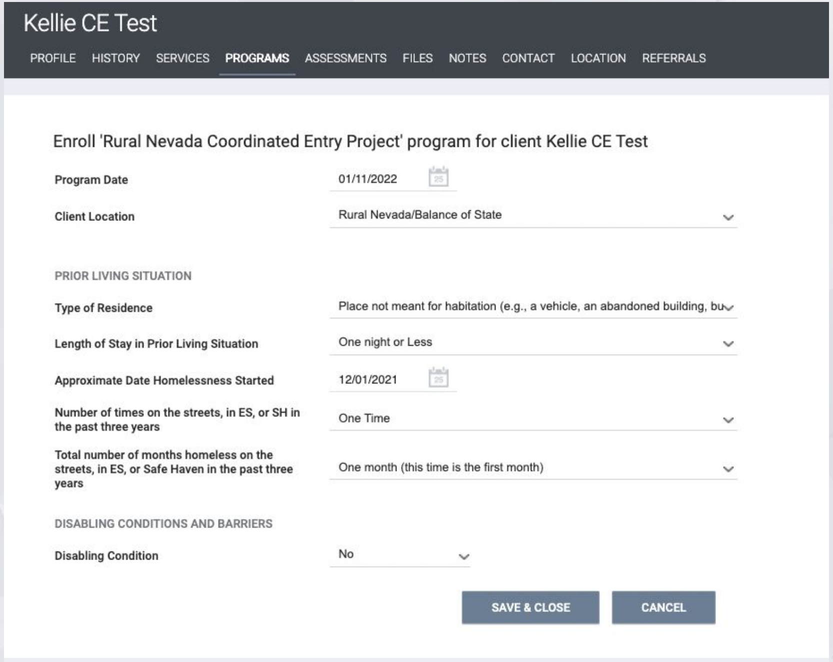
CE Project Enrollment:
Enrollment Screen

Fill Out the Enrollment Screen

- Project Start Date
- Prior Living Situation
- Disabling Condition

Avoid using data unknown or data not collected.


Kellie CE Test

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS FILES NOTES CONTACT LOCATION REFERRALS

Enroll 'Rural Nevada Coordinated Entry Project' program for client Kellie CE Test

Program Date	01/11/2022
Client Location	Rural Nevada/Balance of State

PRIOR LIVING SITUATION

Type of Residence	Place not meant for habitation (e.g., a vehicle, an abandoned building, bu
Length of Stay in Prior Living Situation	One night or Less
Approximate Date Homelessness Started	12/01/2021
Number of times on the streets, in ES, or SH in the past three years	One Time
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	One month (this time is the first month)

DISABLING CONDITIONS AND BARRIERS

Disabling Condition	No

SAVE & CLOSE CANCEL

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Current Living Situation (CLS)

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CLS Assessment: Overview

A Current Living Situation (CLS) is used to document the following:

- The current living situation of people experiencing homelessness
- Homeless chronicity
- Engagement with the Homelessness Response System
- When entered by shelter or outreach project types, the CLS can be used as a homeless verification.
- Collected for the Head of Household (HoH) and other adults in the household.

CLS Assessment: Requirements

A Current Living Situation is required if any of the following occur:

- Project start
- A CE Assessment or CE Event service is recorded
- The client’s living situation changes
- If a CLS hasn't been recorded for the past month.
- Rural Nevada policy requires a CLS is completed at least every 30 days.

**Note: If two of the above occur on the same day, you only enter one CLS.*

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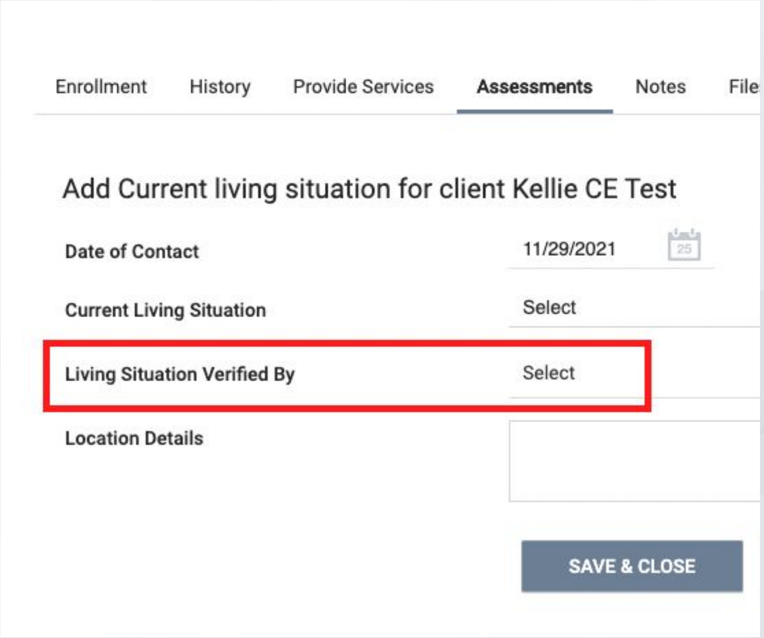
CLS Assessment: Verified By

- **Living Situation Verified By**:
  - Sorted by CoC, then Project Type, then Agency, then Project

- *Verified By* is intended for data to be entered "on behalf" of a non-HMIS participating projects.
  - This field is not required.



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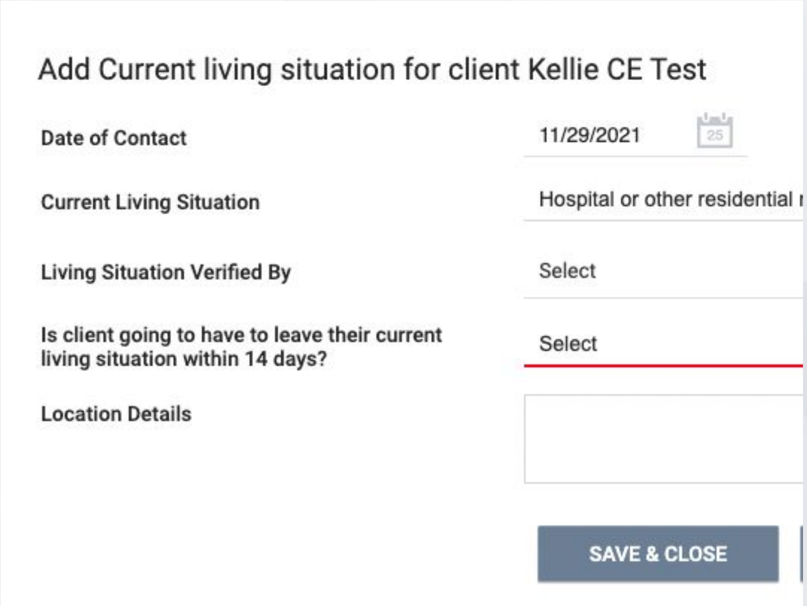
CLS Assessment: Additional Questions

Additional Information on *the CLS*

- Additional questions on the CLS may appear, depending on the client's responses.


Add Current living situation for client Kellie CE Test

Date of Contact 11/29/2021

Current Living Situation Hospital or other residential

Living Situation Verified By Select

Is client going to have to leave their current living situation within 14 days? Select

Location Details

SAVE & CLOSE

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CLS Assessment: FAQ

Current Living Situation FAQ:

1. A client is enrolled into a coordinated entry program. Do you need to complete a CLS? **Yes**

2. A client is enrolled into a coordinated entry program and completes an assessment at the same time. You will need to complete two CLS. **False**

3. A client is exited from a coordinated entry program. Do you need to complete a CLS? **No**

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Coordinated Entry Assessments & Assessor Workflow

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Assessment Best Practices

- Person-Centered
  - Focused on resolving the person's needs
  - Strengths-based
  - Sensitive to trauma
- Culturally and Linguistically Competent
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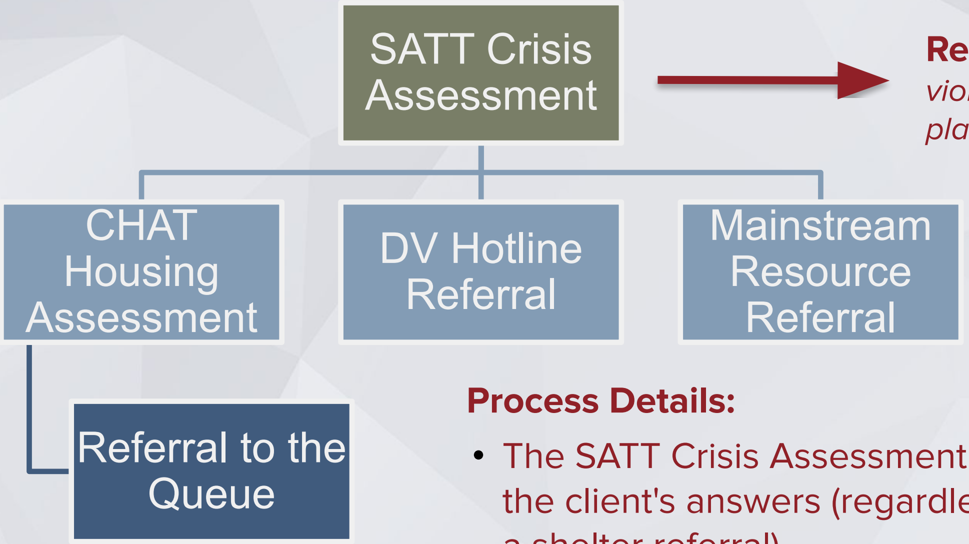
CE Assessor Workflow Overview



Referral: to Shelter *and all survivors of domestic violence will be informed of an emergency transfer plan.*

Process Details:

- The SATT Crisis Assessment will indicate your next step based on the client's answers (regardless of whether the client is in need of a shelter referral).
- If needed, you can refer directly to shelter after you complete the SATT.
- You can complete the SATT and the CHAT on the same day, if necessary.

CE Assessor workflow: SATT-Crisis Needs Assessment

- **Why the SATT?**
  - Implement standardized decision-making processes to determine if further assessment is needed
  - Align with statewide initial assessment
- **Short Assessment Triage Tool "SATT"**
  - Intended to provide a quick assessment and referral to those needing shelter imminently
  - Informs diversion options or referrals to emergency shelter

CE Assessor Workflow:
SATT Assessment

Crisis Needs Assessment intended to:

- Assist staff with guidance on the triage process
- Provide questions to inform diversion options
- Provide Emergency shelter information if appropriate
- Share with all survivors of domestic violence of an emergency transfer plan
- Confirms gaps or areas of need in the RN CoC

Assessors should complete the **SATT for all clients**.

CE Assessor Workflow:
Referral to Shelter

- After the SATT is completed, the assessor can refer directly to local shelters.
- Or to a shelter program outside of the CMIS/HMIS System

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CE Assessor Workflow: CHAT/F-CHAT Housing Needs Assessment

- CHAT/F-CHAT
  - Aligns with assessments used statewide
  - Includes a gambling question
  - Single adult CHAT and family CHAT
    - No TAY CHAT, use single adult CHAT
  - Revised scoring referral range
    - Prioritizing people with highest acuity
    - Intended to refer people housing program types according to acuity

CE Assessor Workflow:
Completing the CHAT

After completing the enrollment, the CLS, and the SATT Crisis Needs Assessment, you will then follow the SATT prompts for the next step. The most common SATT prompt will be for you to complete the appropriate CHAT Assessment and then add the client to the queue.

- **Individual CHAT Assessment**
  - Completed if there are no minor children in the family
- **Family CHAT Assessment**
  - Completed if the Family has minor children

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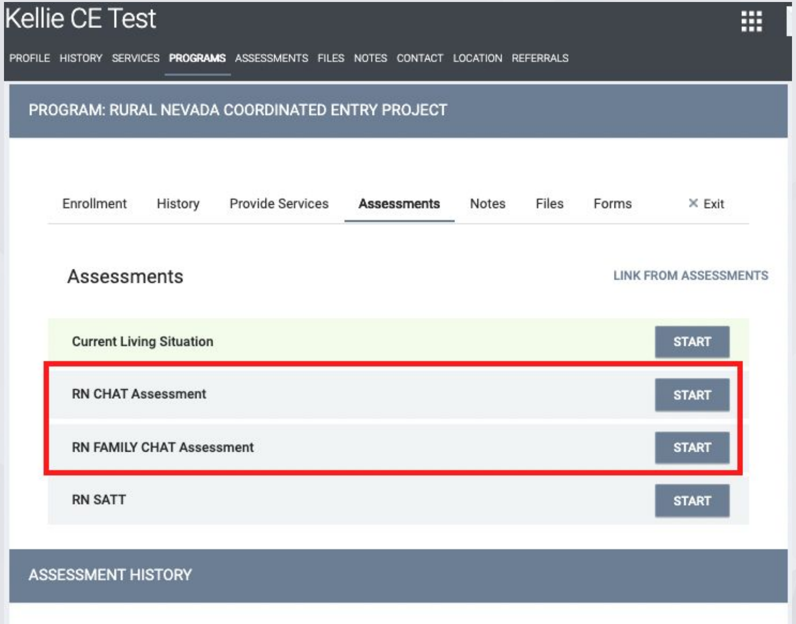
CE Assessor Workflow: **Completing the CHAT**

- Be sure to complete the CHAT assessment in its entirety.
- Please do not prompt the client to respond in any certain way.



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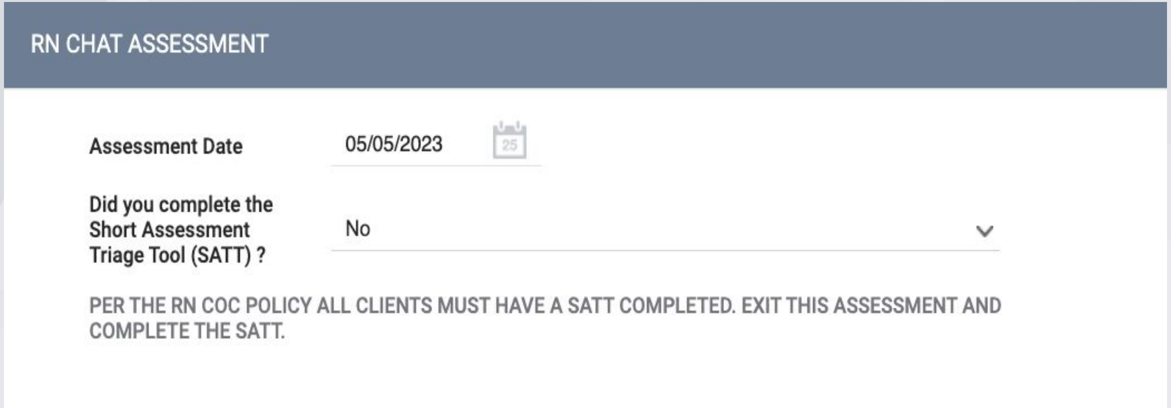
CE Assessor Workflow: **Completing the CHAT**

- New question on both CHAT/F-CHAT regarding if a SATT was completed
  - "No"-- results in no assessment questions visible and a pop-up message appears advising that the SATT must be completed
  - "Yes" -- results in the assessment questions becoming visible



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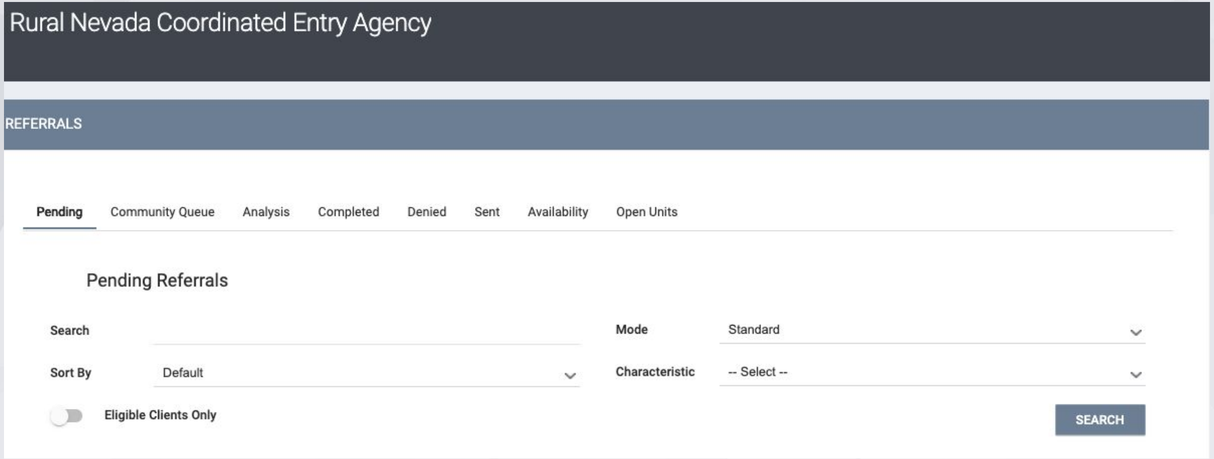
CHAT FAQs

- When can I reassess?
  - CE Policies and Procedures, p. 26
- What if I don't think the score is correct (i.e., the person should have scored higher or lower)?
  - CE Policies and Procedures, p. 12-15
- What if I don't think the person is answering honestly?

Coordinated Entry Referral to the Queue

Orientation to the Queue

- Community queues contain a list of all clients who have been prioritized for resources.
- Rural Nevada (RN) has one default queue for permanent housing referrals.



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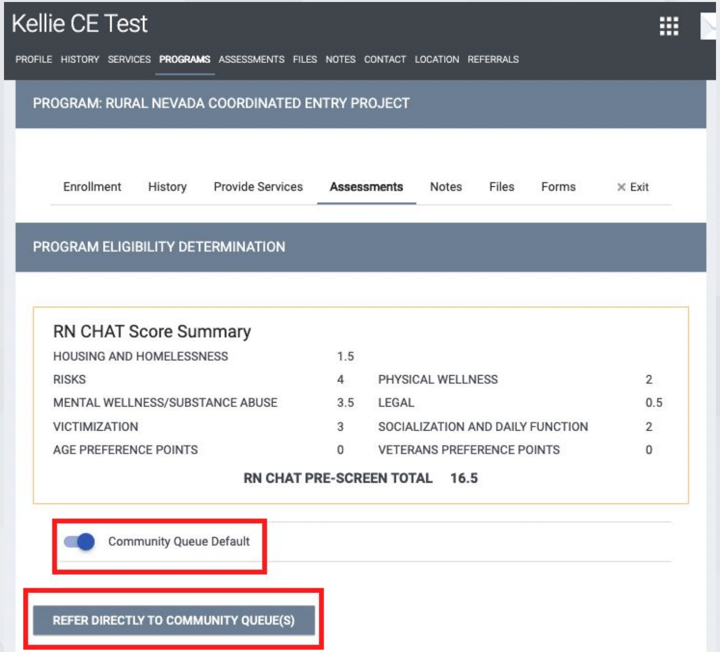
CE Workflow: **Referral to the Queue**

Referral to the Queue:

- The scoring section will appear after you click save on the assessment. Please do not share the score with the client.
- Clients are added to the queue by selecting the Community Queue toggle and then clicking on the button to Refer Directly to the Queue.



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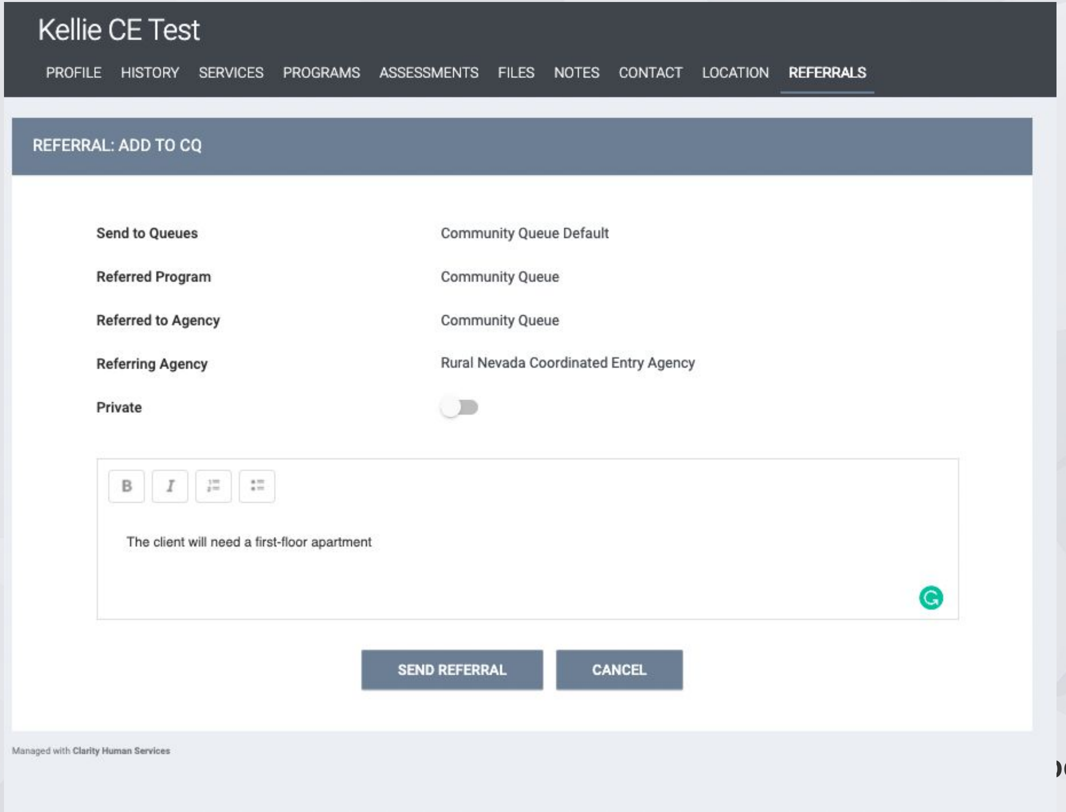
CE Workflow: **Referral to the Queue**

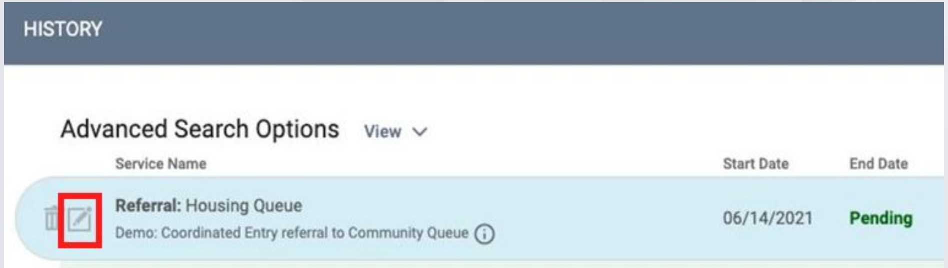
Referral to the Queue:

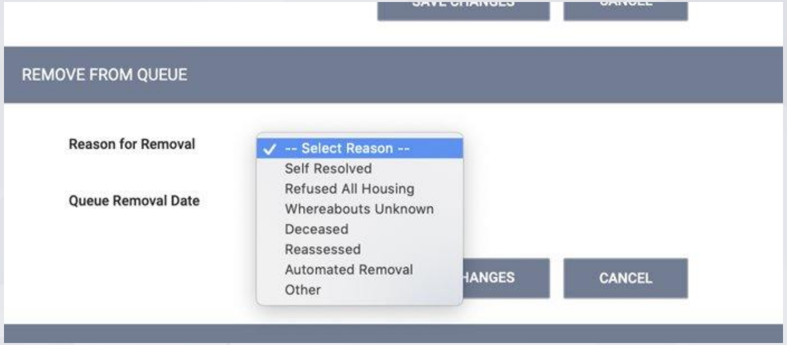
- Add any relevant notes as needed.
- Avoid utilizing the Private Toggle
- Click “Send Referral”



CE Workflow:
Removal from the Queue

- Clients may be removed from the queue if:
  - Self-resolve
  - Added by mistake
  - Declines all services
  - Is deceased





- Use the edit icon next to the referral to remove someone from the queue.

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CE Workflow:
Staying Active on the Queue

- Clients must have a check-in or other system activity at least every **30 days** to stay on the queue.
- A check-in indicates the client is still engaged and will keep the client active on the community queue.

REFERRAL: ASSIGN

Client	Kellie CE Test
Referred to	Community Queue - Community Queue Default
Referring Agency	Rural Nevada Coordinated Entry Agency
Referred Date	01/11/2022 11:52 AM
Days Pending	0 day(s)
Qualified	Yes
RN CHAT score	16.5
Last Activity	01/11/2022 CHECK-IN
Referred by Staff	Kellie Cole

General Coordinated Entry Considerations

- Highest CHAT Score
- Chronicity
- Length of Time Homeless
- Length of time on the Queue
- Additional priorities as needed
- Matchmaker: Occupancy Specialist at Nevada Rural Housing Authority
  - Monitors Community Queue
  - Makes referrals to housing programs after receiving Notification of Vacancy
  - Manages communication regarding complaints, grievances or review requests

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Coordinated Entry Events

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Coordinated Entry Event

- A Coordinated Entry Event (CEE) is designed to capture access and referral events, as well as the result of those events.
- Remember to also complete a Current Living Situation Assessment each time a CEE service is provided

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Coordinated Entry Events

Detail description of CE events is here.

Coordinated Entry Event — Coordinated Entry Event

- Problem Solving/Diversion/Rapid Resolution
- Referral to a Housing Stability Voucher
- Referral to emergency assistance/flex fund/furniture assistance
- Referral to Housing Navigation Project or Service
- Referral to Non-Continuum Services: Ineligible for Continuum Services
- Referral to Non-Continuum Services: No Availability in Continuum Services
- Referral to Post Placement/Follow-up Case Management
- Referral to Prevention Assistance Project
- Referral to Scheduled Coordinated Entry Crisis Needs Assessment
- Referral to Scheduled Coordinated Entry Housing Needs Assessment
- Referral to Street Outreach Projects or Services

Exiting Clients from Coordinated Entry

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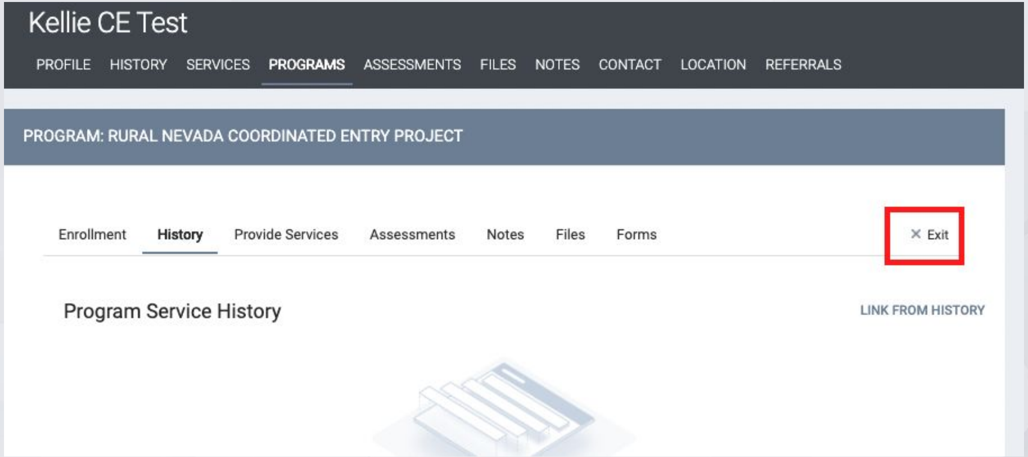
Exiting Clients from Coordinated Entry

A program exit indicates the end of a client's engagement in the coordinated entry process. **A client should be exited from CE for the following reasons:**

- Permanent housing (done automatically)
- Left the CoC
- Deceased
- No Longer Eligible
- Declined all services



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Exiting Clients from Coordinated Entry

The following events will trigger an auto-exit from the CE program:

- No program-level services or assessments have been recorded for a 60 days.
- A Housing Move-In Date is saved for any program with a permanent housing project type.
- A “housed" or “deceased” exit destination is saved for any program exit screen.

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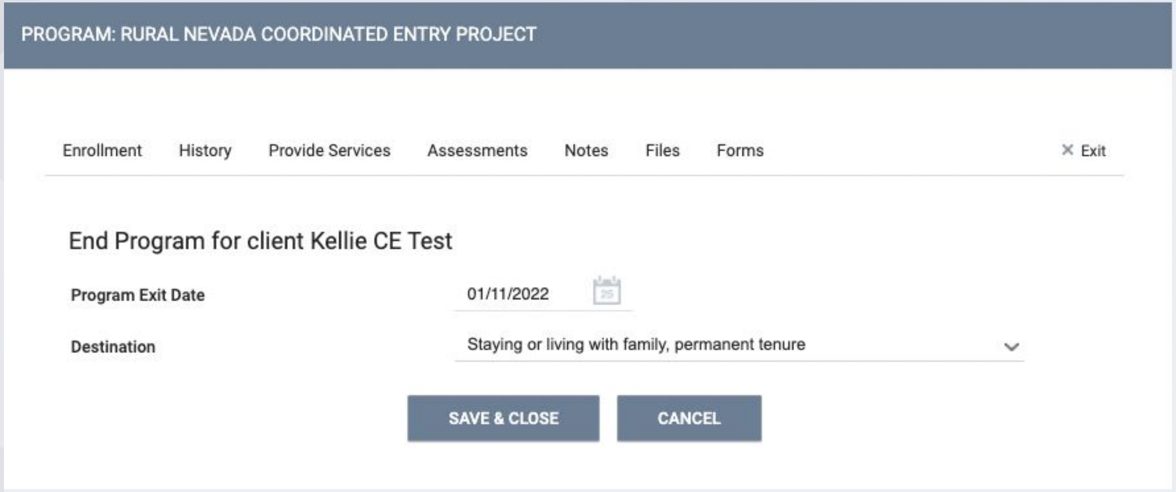
Exiting Clients from Coordinated Entry

The exit screen:

- Project Exit Date
- Destination



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Exits FAQ

FAQ on Exiting Clients

- The client is referred to a PSH program. The client is enrolled in the program with a move-in date of 7/30/22. Will the client be automatically exited? **Yes**
- The client informs their case manager they are going to live with their aunt in california. Will the client be automatically exited? **No (The client needs to be manually exited from coordinated entry).**
- The client is exited from a shelter program and the destination is listed as staying or living with family (permanent tenure). Will the client be automatically exited? **Yes**

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Recap on Workflows

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Recap – Assessor Role

1) Switch to the appropriate Coordinated Entry Agency
2) Search for the client
3) Enroll the client in the CE Project
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   The most common next step will be to complete the CHAT Housing Assessment and refer to the queue.

7) Provide the client with the Coordinated Entry Event service(s) throughout their engagement in the Coordinated Entry system.

Demo in Clarity

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FAQs

FAQs

1. Is a Release of Information (ROI) required for clients who are enrolled in the Coordinated Entry Project?

   Yes. A Release of Information (ROI) is required for all clients whose data is entered and shared in HMIS. This includes clients who are enrolled in the Coordinated Entry Project.

2. Should I exit a client from the Coordinated Entry Project when they are housed in an emergency shelter?

   No. Clients should only be exited from the Coordinated Entry Project when they are permanently housed or are no longer in need of permanent housing.

FAQs

3. The client I am working with is in a household with another adult, and there are no children under the age of 18 in the household. Which Coordinated Entry Assessment should I complete?

   Each adult in the household should have the RN CHAT completed.

4. Should I only enroll the Head of Household in the Coordinated Entry Project?

   All persons in the household who are being served through Coordinated Entry and the Coordinated Entry Project should be enrolled in the Coordinated Entry Project.

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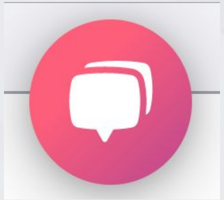
Resources

- FY2024 HMIS Data Standards Dictionary
- FY2024 HMIS Data Standards Manual
- Online Support Portal, help.bitfocus.com
- Bitfocus' Helpdesk
  - nevada@bitfocus.com
  - 702.614.6690 x2 or 775.562.4644 x2
- Help widget/chat bubble in CMIS/HMIS, bottom right corner of the screen:



Coordinated Entry in CMIS/HMIS

Q&A

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Thank you!!

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