

# Housing Problem Solving Workflow Quick Guide



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## 1. Search and review ROI

Client Profile for Betty Crocker. The interface includes tabs for PROFILE, HISTORY, PROGRAMS, SERVICES, ASSESSMENTS, NOTES, FILES, CONTACT, and LOCATION. The 'PROGRAMS' tab is highlighted. Below the profile information, there is a 'Household Members' section with a 'Manage' button. A red box highlights the 'Manage' button.

Search for the client and review the ROI PDF.

| Type   | Start Date   | End Date   | Version    |     |
|--------|--------------|------------|------------|-----|
| System | Attached PDF | 03/11/2020 | 03/11/2023 | V.1 |

A red box highlights the 'V.1' version number.

If the client doesn't appear, add a new client and upload the ROI.

RELEASE OF INFORMATION form. It includes fields for Permission (Yes), Start Date (05/07/2020), End Date (05/07/2023), and Documentation (Select Electronic Signature). A red box highlights the 'Attached PDF' button.

## 2. Enroll in Program

Next, return to the HoH's profile, click programs, and click the down arrow to the right of the program name to begin the enrollment.

Client Profile for Kermit Frog. The interface includes tabs for PROFILE, HISTORY, PROGRAMS, SERVICES, ASSESSMENTS, NOTES, FILES, CONTACT, and LOCATION. The 'PROGRAMS' tab is highlighted. Below the profile information, there is a 'Household Members' section with a 'Manage' button. A red box highlights the 'Manage' button.

PROGRAM HISTORY

There are no results to display

PROGRAMS: AVAILABLE

Abode Services - Best Western - NCV

Active Clients: 11 CLIENTS

Referrals (90 Days): 2 REFERRALS

100% Families, 100% Individuals

100% Referrals Pending, 0% Referrals Connected, 0% Referrals Denied

Service Categories: Other

Include group members: Jeana Test

1 pending referral(s). Oldest 0 days.

ENROLL

Enroll Program for client Jill Test

Project Start Date: 08/01/2017

Is the Client an Adult or Head of Household? Yes (Automatically Generated Response)

## 3. Record Coordinated Entry Assessment

Open the program enrollment.

Client Profile for Betty Crocker. The interface includes tabs for PROFILE, HISTORY, PROGRAMS, SERVICES, ASSESSMENTS, NOTES, FILES, CONTACT, and LOCATION. The 'PROGRAMS' tab is highlighted. Below the profile information, there is a 'Household Members' section with a 'Manage' button. A red box highlights the 'Manage' button.

PROGRAM HISTORY

| Program Name  | Start Date | End Date |
|---|------------|----------|
| Goodnight Family Shelter<br>Emergency Shelter: Night-by-Night<br>[TRAINING] The Sunshine Agency | 07/29/2020 | Active   |

Record the Coordinated Entry Assessment (VI-SPDAT or VI-F-SPDAT) by clicking on the Program Assessments tab. Do not complete an assessment without taking VI-SPDAT training.

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]

For clients that have an existing VI-SPDAT you should record a new one only if it has been more than 365 days or if there has been a major life change.

## 4. Coordinated Entry Assessment (cont.)

Click Refer Directly to Community Queue button if the client scores a 4+ or any score if they are a Veteran. Please do not forget this step. It places the person on the prioritization list.

*Note: The CE Assessment can also be completed after Problem Solving*

## 5. Record Housing [PS] Services

Record the first housing problem solving conversation using the [PS]Housing Problem Solving Service Attempted service.

## 6. Record Housing [PS] Services (cont.)

Follow up conversations should be documented using the other 3 [PS] services categories. Enter the same date for (Start/End/Result/Expense) date fields.

**It is expected that the Result: Client housed/re-housed in a safe alternative result is No. Until the person is ready to exit the program.**

## 8. Program Exit

When a Housing Problem Solving conversation results in "Result: Client housed/re-housed in a safe alternative"= Yes. This person should be exited from the program. \*\*Note, a person can have a "Yes" result without financial assistance.

Click Exit on the right side of the screen to complete the exit details.

## 7. Financial assistance [PS] Services

Financial assistance services include an Expense Amount. Financial assistance is not required for a successful Housing Problem Solving resolution.

## Summary of [PS] Services

### Services

|   |                          |
|---|--------------------------|
| [PS] Housing Problem Solving Attempted              | Only record once         |
| [PS] Housing Problem Solving Connection to Services |                          |
| [PS] Housing Problem Solving Financial Assistance   | Use for all other convos |
| [PS] Housing Problem Solving Mediation              |                          |

Security Deposit

Start Date:07/20/2020

End Date:07/20/2020

Result: Client housed/re-housed in a safe alternative:  
No

Result Date:07/20/2020

Expense Amount:2500.00

Expense Date:07/20/2020

Funding Source:No Funding Source

Service Note

B I

Client received security deposit check #1526 for \$2500. Meeting scheduled next week with case manager to resolve utility arrears.

SUBMIT