Coordinated Entry in CMIS/HMIS

Clarity Human Services Training

December, 2021

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Agenda

1. Welcome & Introductions
2. Transition to CHAT - CoC/Coordinated Entry Leadership
3. Overview of Coordinated Entry Process in Clarity Human Services
    - Coordinated Entry Project Enrollment
    - Current Living Situation
    - CE Assessor Workflow
    - CE Events
    - CE Exits
    - Staying Active on the Queue
4. Recap
5. Demo in Clarity
6. FAQs / Resources / Q&A

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Transition to the CHAT

Announcements from CoC/Coordinated Entry Leadership

CHAT Transition

- Why move from the VI-SPDAT CHAT
  - VI-SPDAT no longer supported by OrgCode
    - https://www.bitfocus.com/blog/deficiencies-of-the-vi-spdat
  - Very similar questions, different order, some rewording
    - Added problem gambling
  - Aligns with assessments used statewide

CHAT Transition

VI-SPDAT ➜ CHAT

- 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

CHAT Transition

- **Crisis Assessment vs CHAT**

- **Short Assessment Triage Tool “SATT”**
  - Intended to provide a quick assessment and referral to those needing shelter imminently
  - Inform diversion options or referrals to emergency shelter

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CHAT Transition

- Proposed timeframe
  - Go live with CHAT on December 7th
    - VI-SPDAT no longer available Dec 17th
  - Deadline to have all reassessments completed
    - March 31st (3 months of transition time)
- Transition plan for the queue
  - We will have two lists essentially
  - Scoring equivalency
    - Use equivalent percentages to make referrals

General Coordinated Entry Considerations

- Number of people on the queue
- Length of time on the queue
- Criteria to be referred to the queue
  - Must meet HUD homeless criteria
  - Revised Family definition
- Coordinated Entry Case Conferencing
- Matchmaker—Washoe County
  - John Etchemendy
  - jetchemendy@washoecounty.gov

CE Process

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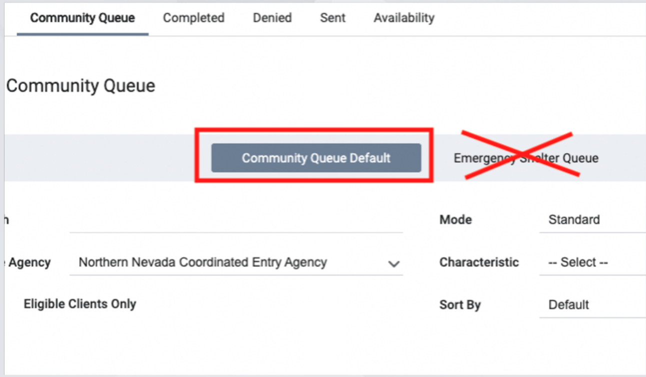
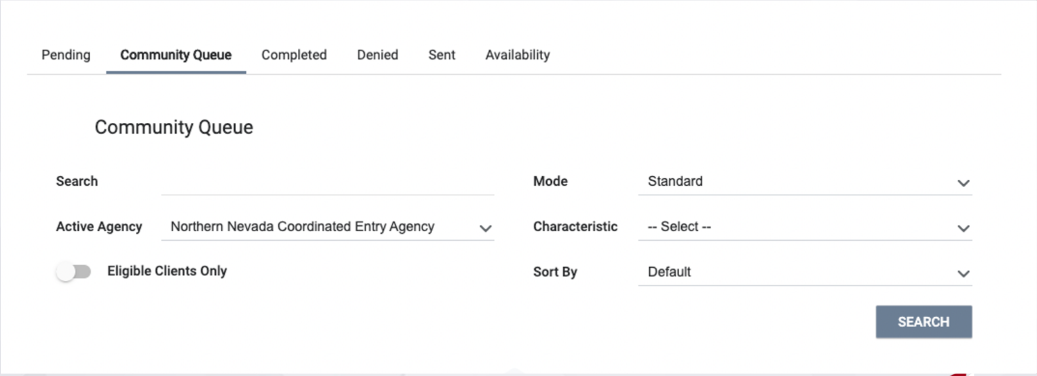
Orientation to the Queue

- Community queues contain a list of all clients who have been prioritized for a resource.
- Northern Nevada (NN) has one default queue for permanent housing referrals.
- Per this training, NN is transitioning away from the Emergency Shelter Queue.



Old Process with Two Queues



New Process with Only One Queue

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CE 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.

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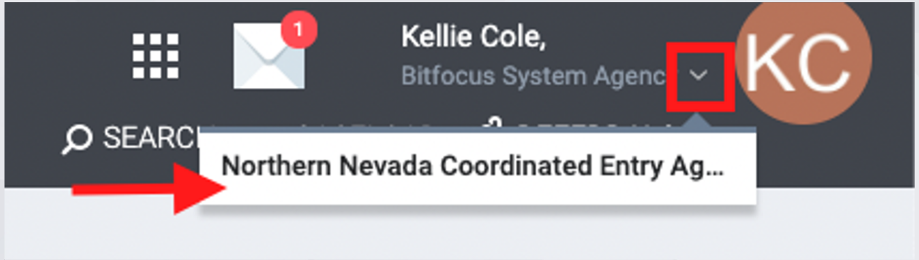
CE Project Enrollment: **Switching Agencies**

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



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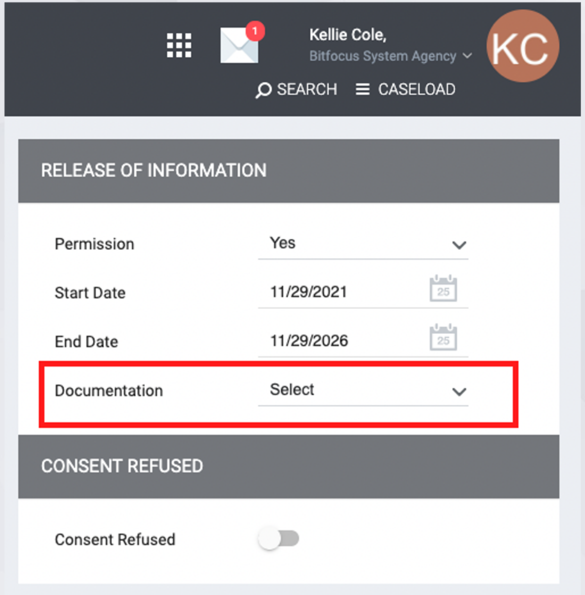
CE Project Enrollment:
ROI and Profile Creating

Make Sure an ROI is completed

- After switching to the Northern 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**



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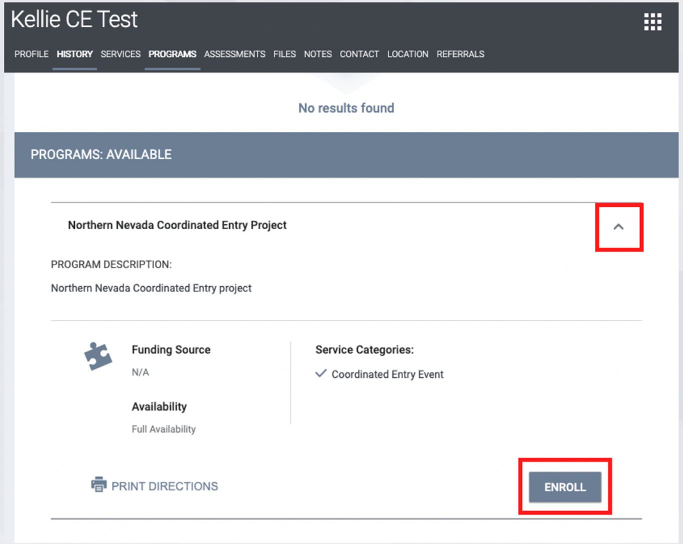
CE Project Enrollment: **Enrolling the Client**

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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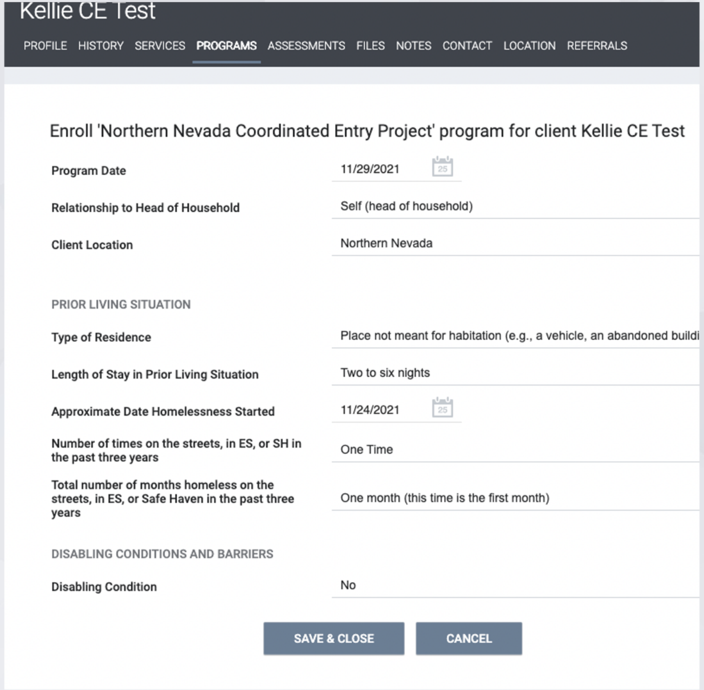
CE Project Enrollment:
Enrollment Screen

Fill Out the Enrollment Screen

- Project Start Date
- Prior Living Situation
- Disabling Condition

Avoid using data unknown or data not collected.



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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:

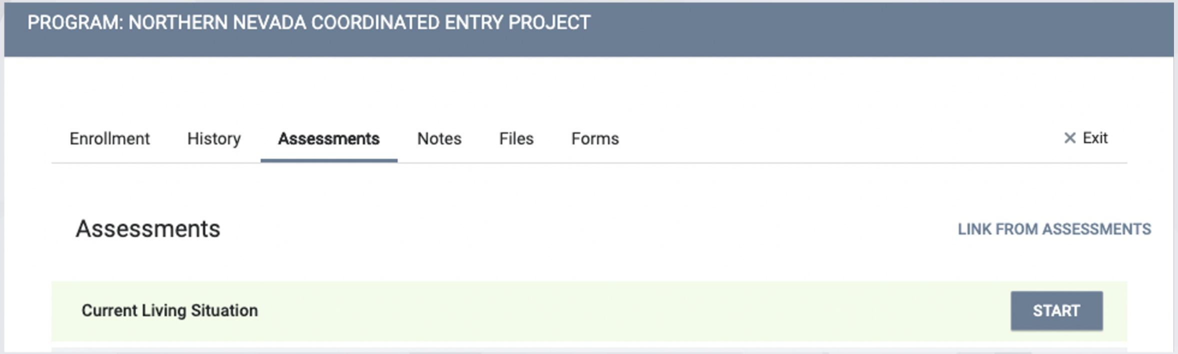
- The current living situation of people experiencing homelessness
- Homeless chronicity
- Engagement with the Homeless Responses System
- When entered by shelter or outreach project types, the CLS can be used as a homeless verification.
- Collected for the Head of Household (HoH) and other adults.

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.

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



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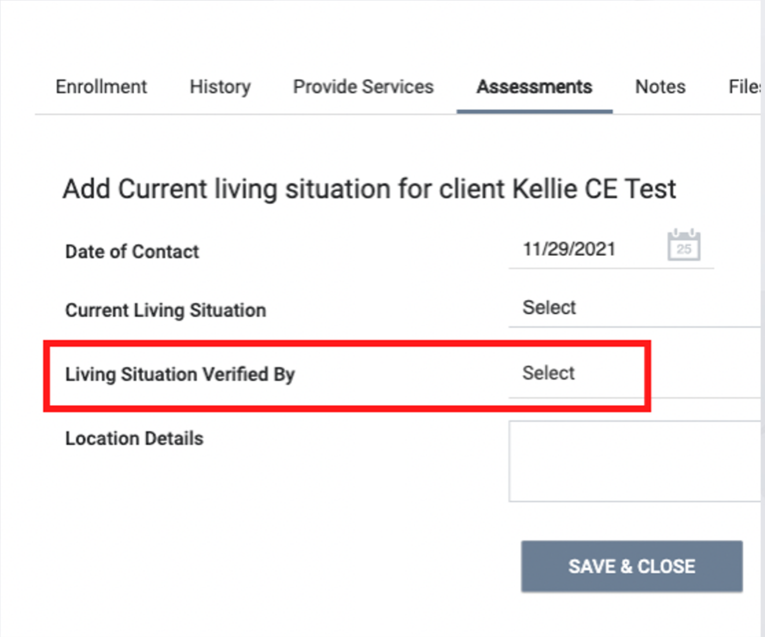
CLS Assessment: Verified By

- **Living Situation Verified By**:
  - Sorted by CoC, then Project Type, then Agency, then Project
- *Verified By* is data to be entered "on behalf" of another project by the CE. Specifically, it is intended to be used for 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.

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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**

1. 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**

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

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CE Assessor Workflow

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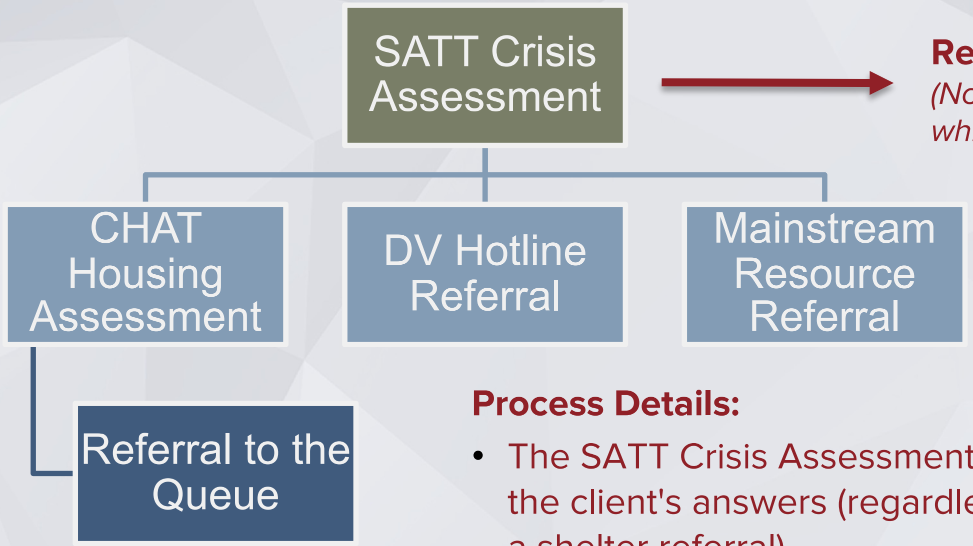
CE Assessor Workflow



Referral to Shelter, *If Needed*
(Northern Nevada's current process which occurs outside of Clarity)

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.
- If the client is already in shelter, you can begin with the CHAT.

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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

Complete the SATT when an individual or household is in imminent need of shelter.

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CE Assessor Workflow: **Referral to Shelter**

- After the SATT is completed, the assessor can refer directly to shelter by utilizing the pop-up information around local shelters after completing the SATT.

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

PROGRAM ELIGIBILITY DETERMINATION

If appropriate, refer the client to Emergency Shelter:

Women and Family Emergency Shelter
Our Place
605 S. 21st Street, Sparks NV 89431
Phone: 775-327-7501

Single Adults and Couples Emergency Shelter
Nevada Cares Campus
1800 Threlkel St., Reno, NV, 89512
Phone: 775-329-4141

Domestic Violence Emergency Shelters
Safe Embrace
220 S Rock Blvd Suite 7, Reno, NV 89502
Phone: (775) 322-3466
Email: info@safeembrace.org

Domestic Violence Resource Center (DVRC)
1735 Vassar St, Reno, NV 89502
Phone: (775) 329-4150
Email: info@domesticviolenceresourcecenter.org

CE Assessor Workflow:

CHAT Assessment and Referral to the Queue

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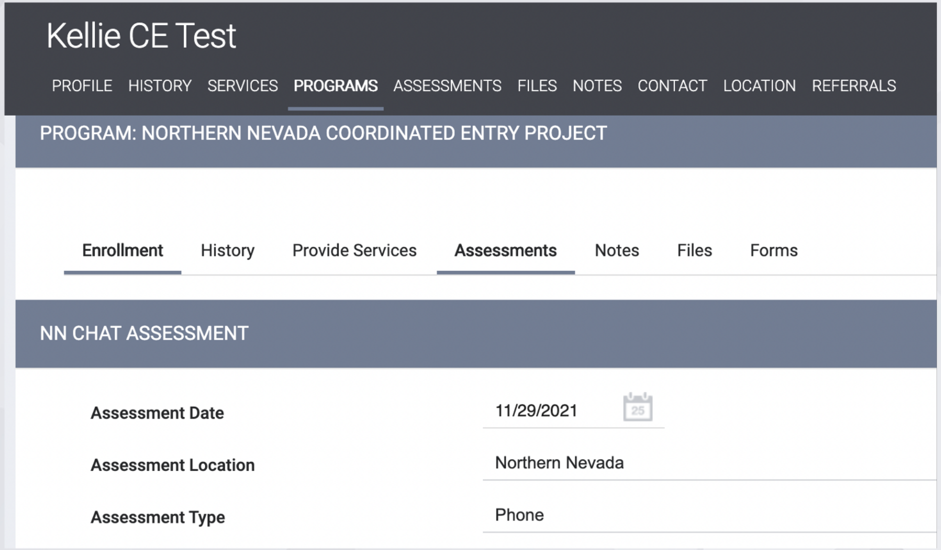
CE Assessor Workflow: **Completing the CHAT**

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 enroll 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

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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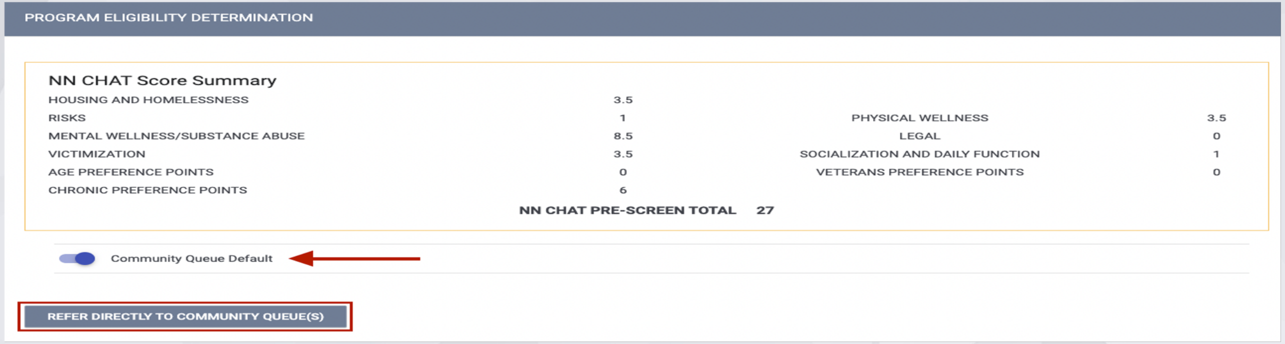
CHAT FAQs

- Can I stop the CHAT and restart if needed?
- When can I reassess?
- What if I don't think the score is correct, ie the person should have scored higher or lower?
- What if I don't think the person is answering honesty?

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.
- The CHAT score referral threshold will be shared by CoC Leadership next week. If a client scores below the referral decided threshold, they should be referred to mainstream resources rather than to the Queue.



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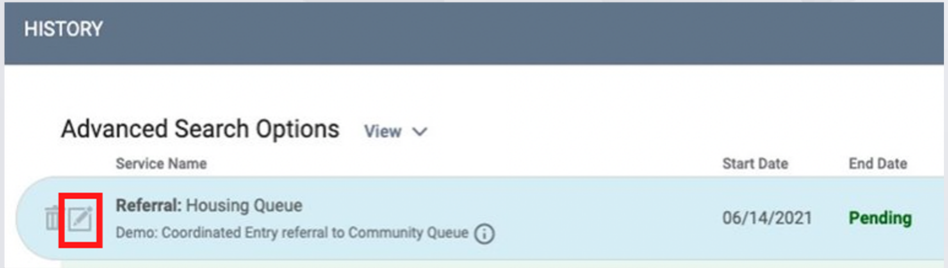
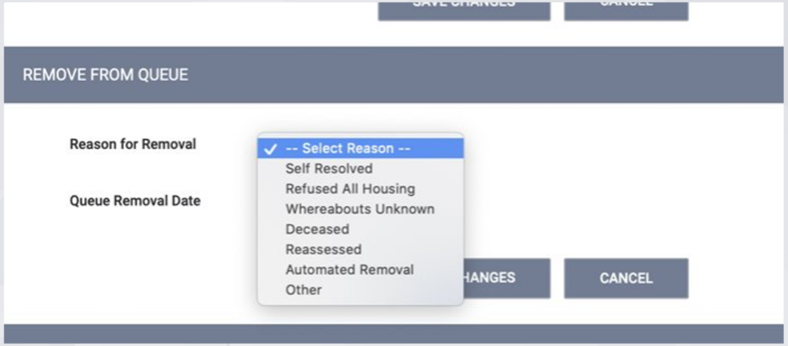
CE Workflow:
Removal from the Queue

- Clients may removed from the queue if:
  - Self-resolve
  - Added by mistake

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





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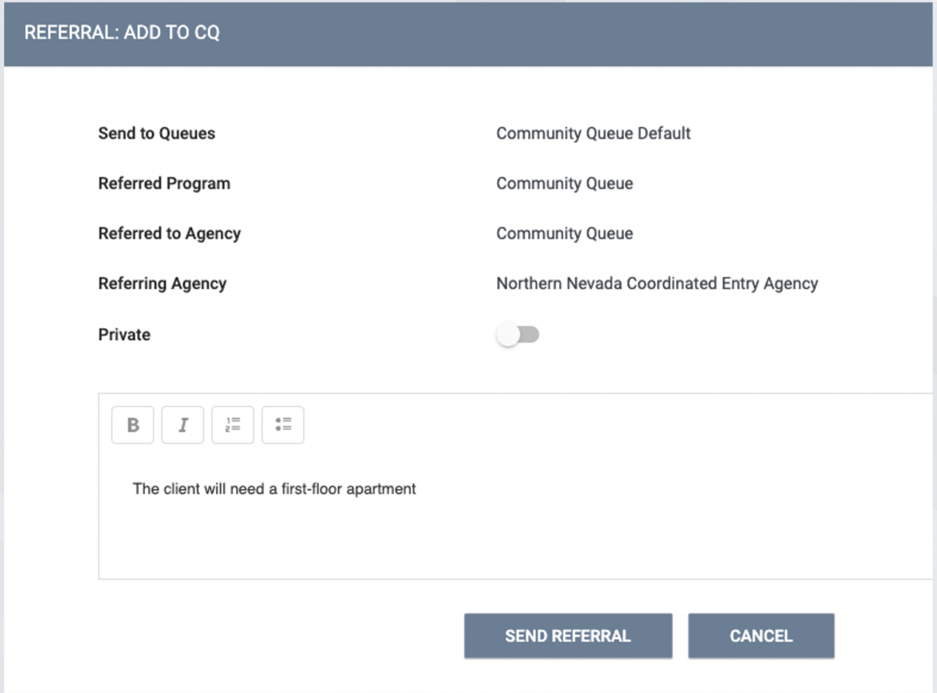
CE Workflow: **Referral to the Queue**

Referral to the Queue:

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



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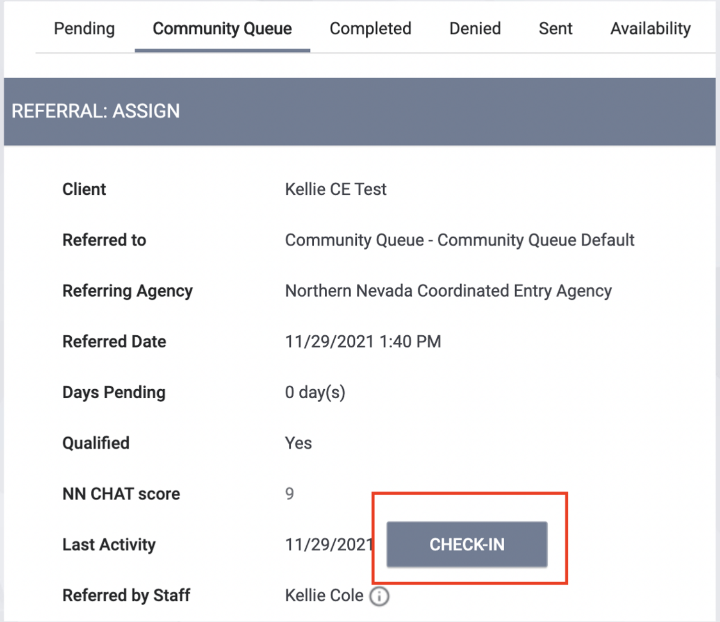
CE Workflow:
Staying Active on the Queue

- Clients must have a check-in or other system activity at least every **60 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.



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Coordinated Entry Events

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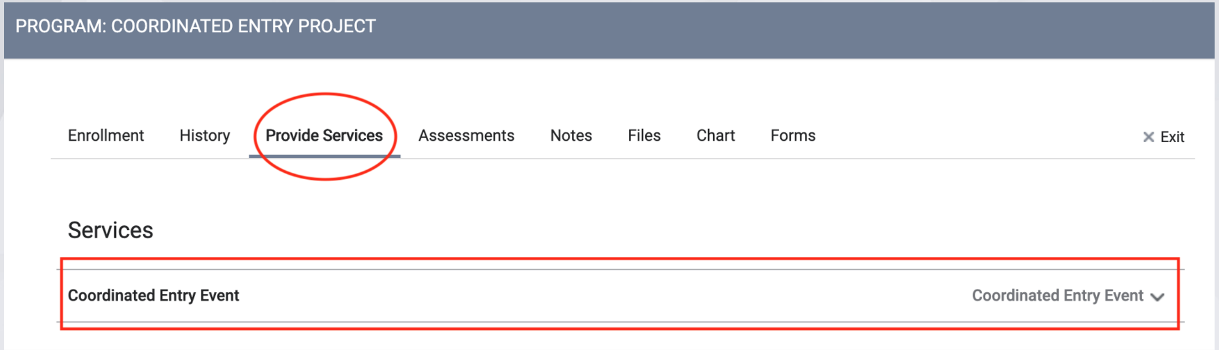
Coordinated Entry Event

- 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

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

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Coordinated Entry Events

1. Problem Solving/Diversion/Rapid Resolution

   The client participated in a diversion or rapid resolution problem-solving conversation and received assistance; or other local equivalent.

2. Referral to Housing Stability Voucher

   The client was referred to a Housing Stability Voucher that is targeted to people experiencing homelessness funded through public housing agencies. A “referral” indicates there is an opening for the client to be housed by this project (or local equivalent).

1. Referral to emergency assistance/flex fund/furniture assistance

   The client was referred to a one-time, nominal financial assistance service to assist in securing or maintaining housing.

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Coordinated Entry Events

4. Referral to Housing Navigation Project or Service

The client received a referral to an SSO or other services only project or service for the purpose of receiving Housing Navigation services because a specific bed or unit in another project is not immediately available. Housing Navigation services include assistance with identifying, preparing documentation for, or applying for appropriate housing, including subsidized and unsubsidized housing.

5. Referral to Non-Continuum Services: Ineligible for Continuum Services

The client received a referral to non-continuum services because they were ineligible for continuum services. Non-continuum services may include emergency assistance projects for those not at-risk of or not experiencing homelessness.

6. Referral to Non-Continuum Services: No Availability in Continuum Services

Eligible clients who could not be referred to continuum services because there is no availability in continuum services, or because client was eligible but was not prioritized for continuum services.

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Coordinated Entry Events

7. Referral to Post Placement/Follow-up Case Management

   The client received a referral to a post-placement service or follow-up case management. Post-placement/follow-up case management services are services provided to clients after they have exited a residential project. These types of services are not limited to any particular project type.

8. Referral to Prevention Assistance Project

   The client received a referral to a homelessness prevention assistance project.

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Coordinated Entry Events

9. Referral to Scheduled Coordinated Entry Crisis Needs Assessment
    - The client received a referral to a Coordinated Entry Crisis Needs Assessment.
    - Coordinated Entry Crisis Needs Assessment is defined as an assessment conducted for immediate, crisis-based needs; initial, short, focused assessment to help caseworkers identify immediate resolutions to address emergency needs, including shelter.
    - The SATT is the Crisis Needs Assessment in Northern Nevada

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Coordinated Entry Events

10. Referral to Scheduled Coordinated Entry Housing Needs Assessment

The client received a referral to a Coordinated Entry Housing Needs Assessment; or other local equivalent.

Coordinated Entry Housing Needs Assessment is defined as an assessment conducted for housing needs; more in-depth, housing focused assessment to help caseworkers direct clients to resources for stabilization of their housing situation.

11. Referral to Street Outreach Projects or Services

The client received a referral to a Street Outreach project or services, or other local equivalent referral.

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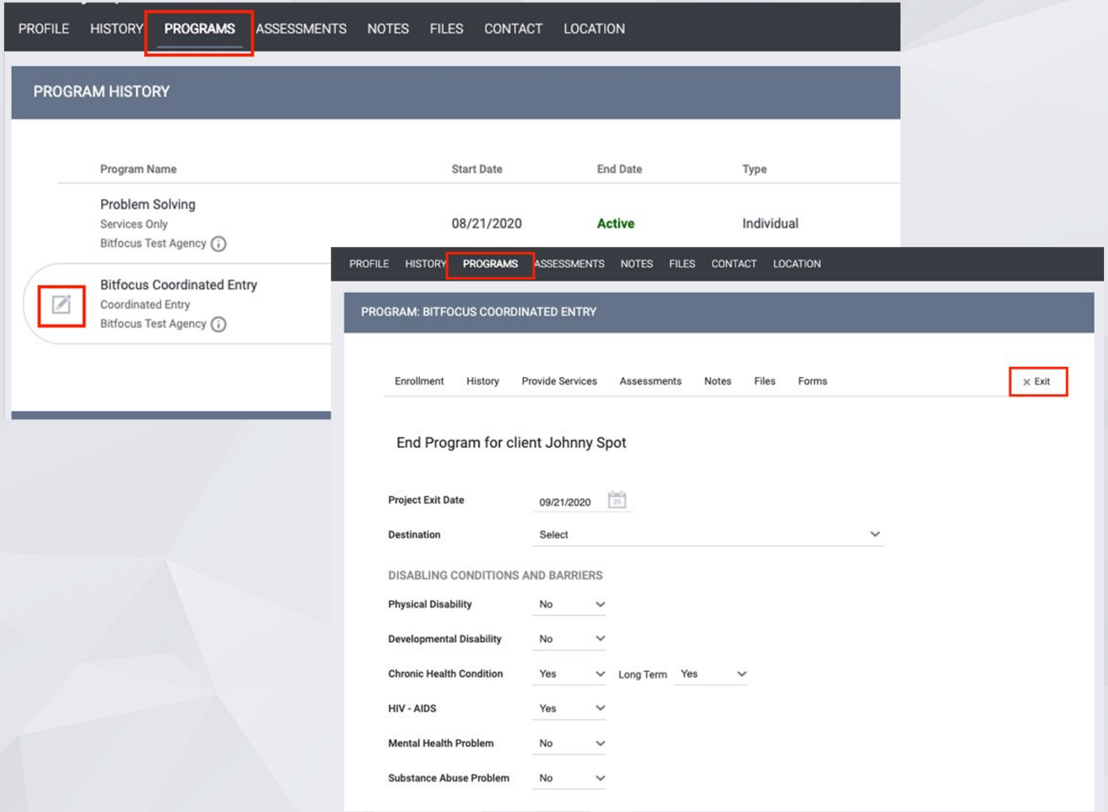
Exiting Clients from Coordinated Entry

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



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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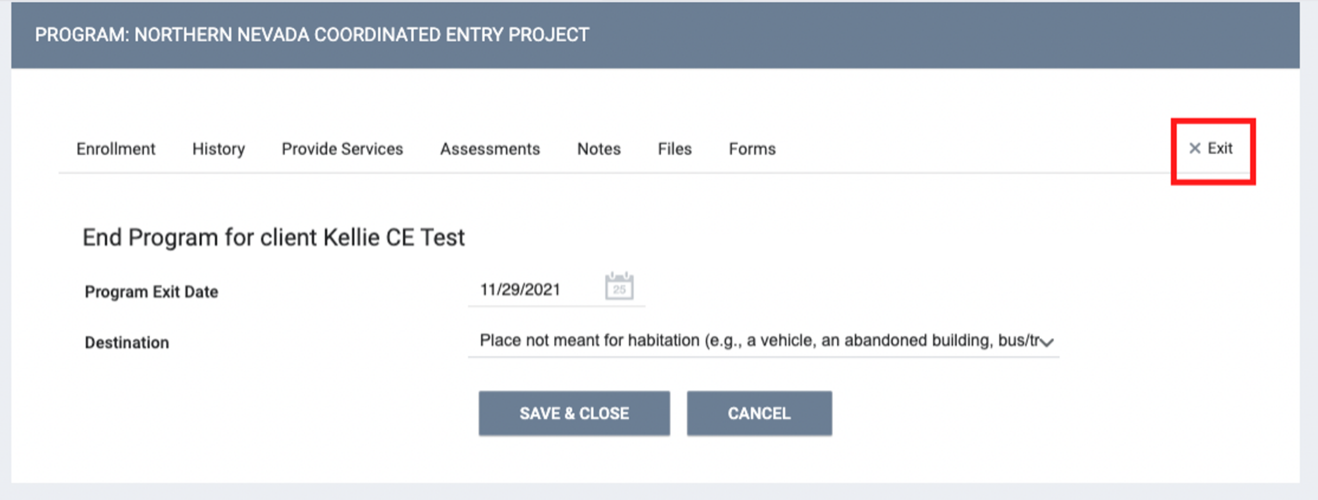
Exiting Clients from Coordinated Entry

The exit screen:

- Project Exit Date
- Destination



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Exiting Clients from Coordinated Entry

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 7/30/21. Will the client be automatically exited? **Yes**

- The client informs their case manager they are going to live with their aunt in Oregon. 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
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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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.

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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 NN 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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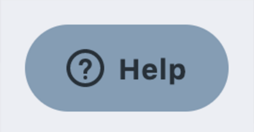
Resources

- FY2022 HMIS Data Standards Dictionary: https://files.hudexchange.info/resources/documents/FY-2022-HMIS-Data-Dictionary.pdf
- FY2022 HMIS Data Standards Manual:

  https://files.hudexchange.info/resources/documents/FY-2022-HMIS-Data-Standards-Manual.pdf
- Online Support Portal, get.clarityhs.help: https://get.clarityhs.help/hc/en-us/articles/360033705974-2020-HMIS-Data-Standards-Coordinated-Entry-Data-Elements-Details
- Bitfocus Helpdesk
  - nevada@bitfocus.com
  - 702.614.6690 x2 or 775.562.4644 x2
- Help widget in CMIS/HMIS, bottom right corner of the screen: 

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Coordinated Entry in CMIS/HMIS

Q&A

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