Coordinated Entry in CMIS/HMIS

Clarity Human Services Training

January, 2021



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



Transition to the SATT/CHAT

- Coordinated Entry Mapping Project
 - Completed in August 2020
 - Identified a number of areas within the CES requiring attention, shifts in processes, and further development
- Coordinated Entry Action Plan
 - Developed and approved in September 2020 in response to findings
 - Outlined a number of system-wide changes to optimize the CES to better serve our friends and neighbors experiencing homelessness



• 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



- 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



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

Proposed timeframe

- Go live with CHAT on January 18
 - VI-SPDAT no longer available for new assessments
- Deadline to have all reassessments completed
 - June 30, 2022 (5 months of transition time)
- Transition plan for the queue
 - We will have two lists from which the matcher will pull an equal number of referrals for an open spot until all participants have been reassessed



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 a review request



Coordinated Entry Process



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.

Rural Nev	rada Coordii	nated E	intry Age	ncy					
REFERRALS									
Pending	Community Queue	Analysis	Completed	Denied	Sent	Availability	Open Units		
Per	nding Referrals								
Search							Mode	Standard	~
Sort By	Default					~	Characteristic	Select	~
()	Eligible Clients Only								SEARCH



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





CE Project Enrollment: ROI and Profile Creating

Make Sure an ROI is completed

- 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**





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.

Kellie CE Test PROFILE HISTORY SERVICES PROGRAMS	ASSESSMENTS FILES NOTES CONTACT LOCATION REFERBALS
PROGRAMS: AVAILABLE	
Rural Nevada Coordinated Entry Project PhoGRAM DESCRIPTION: Rural Nevada Coordinated Entry project	Active Clients
Funding Source NA Availability Full Availability Include group members:	Service Categories: V Coordinated Entry Event
Carson Test	ENPOLL



CE Project Enrollment: Enrollment Screen

Kellie CE Test

Fill Out the Enrollment Screen

- Project Start Date
- Prior Living Situation
- Disabling Condition

Avoid using data unknown or data not collected.

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 aband	oned building, buv
Length of Stay in Prior Living Situation	One night or Less	~
Length of Stay in Prior Living Situation Approximate Date Homelessness Started	One night or Less	~
Length of Stay in Prior Living Situation Approximate Date Homelessness Started Number of times on the streets, in ES, or SH in the past three years	One night or Less 12/01/2021	~
Length of Stay in Prior Living Situation Approximate Date Homelessness Started Number of times on the streets, in ES, or SH in the past three years Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	One night or Less 12/01/2021 One Time One month (this time is the first month)	~
Length of Stay in Prior Living Situation Approximate Date Homelessness Started Number of times on the streets, in ES, or SH in the past three years Total number of months homeless on the streets, in ES, or Safe Haven in the past three years DISABLING CONDITIONS AND BARRIERS	One night or Less 12/01/2021	

SAVE & CLOS

CANCEL



Current Living Situation (CLS)



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.



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.

Enrollment	History	Provide Services	Asse	essments	Notes	File		
Add Curr	rent living	situation for c	lient l	Kellie CE	Test			
Date of Con	tact			11/29/2021	25			
Current Livi	ng Situation			Select				
Living Situa	tion Verified	Ву		Select				
Location De	tails							
				SAVE	& CLOSE			



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 r
Living Situation Verified By	Select
Is client going to have to leave their current living situation within 14 days?	Select
Location Details	
	SAVE & CLOSE



CLS Assessment: FAQ

Current Living Situation FAQ:

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



Coordinated Entry Assessor Workflow



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



CE Assessor Workflow



Referral to the Queue

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.



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.



CE Assessor Workflow: Referral to Shelter

• After the SATT is completed, the assessor can refer directly to local shelters after completing the SATT.



CE Assessor Workflow: CHAT Assessment and Referral to the Queue



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



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.

ſel	lie CE Tes	st						:	:
ROFIL	E HISTORY SERVIC	DES PROGRAM	AS ASSESSMENTS FILES	NOTES CONTACT	LOCATION RI	EFERRALS			
Pi	ROGRAM: RURA	AL NEVADA	COORDINATED E	NTRY PROJECT					
	Enrollment	History	Provide Services	Assessments	Notes	Files	Forms	× Exit	
	Assessm	ients					LINK FI	ROM ASSESSME	NTS
	Current Livi	ng Situation			START				
	RN CHAT AS	ssessment						START	
	RN FAMILY	CHAT Asses	sment					START	
	RN SATT							START	





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.

Enrollment	History	Provide Services	Asses	sments Notes Files	Forms	× Exit
OGRAM ELIGIB	ILITY DETE	RMINATION				
RN CHAT So	core Sum	imary				
HOUSING AND H	IOMELESSNE	ESS	1.5			
RISKS			4	PHYSICAL WELLNESS		2
MENTAL WELLN	ESS/SUBSTA	ANCE ABUSE	3.5	LEGAL		0.5
VICTIMIZATION			3	SOCIALIZATION AND DAILY	FUNCTION	2
AGE PREFERENC	E POINTS		0	VETERANS PREFERENCE P	OINTS	0
		RN CHAT P	RE-SCR	EEN TOTAL 16.5		
		RN CHAT P	RE-SCR	EEN TOTAL 16.5		



CE Workflow: Referral to the Queue

Referral to the Queue:

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

Kellie CE Test								
PROFILE HISTORY SERVICES PROGRAM	S ASSESSMENTS	FILES NOTES	CONTACT	LOCATION	REFERRALS			
		_						
REFERRAL: ADD TO CQ								
Send to Queues Community Queue Default								
Referred Program	Comm	unity Queue						
Referred to Agency	Comm	unity Queue						
Referring Agency	Rural N	levada Coordinated	Entry Agency	/				
Private								
B I 2= :=								
The client will need a first-floor apartm	ent							
						C		
			_					
	SEND REFERE	RAL CA	NCEL					
aged with Clarity Human Services								

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.

STORY			
Advanced Search Optio	NS View ∨	Start Date	End Date
Referral: Housing Queue Demo: Coordinated Entry refer	ral to Community Queue 🕢	06/14/2021	Pending
REMOVE FROM QUEUE	SATE OFFAITURS	UNIVEL	1
REMOVE FROM QUEUE Reason for Removal	✓ Select Reason	UNIDE	



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.

FERRAL: 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 🕡	





- 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

PRO	GRAM: COOR	DINATE	DENTRY PROJECT							
	Enrollment	History	Provide Services	Assessments	Notes	Files	Chart	Forms	×е	xit
	Services									
	Coordinated	Entry Eve	nt						Coordinated Entry Event 🗸	



Cool	rdinated 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	~	



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).

3. 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.



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.



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.



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



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.





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

Kellie Cl	E Tes	t								
PROFILE H	IISTORY	SERVICES	PROGRAMS	ASSESSMENTS	FILES	NOTES	CONTACT	LOCATION	REFERRALS	
PROGRAM: R	URAL NE	EVADA CO	ORDINATED E	NTRY PROJECT						
Enrollmer	nt His	tory Pr	ovide Services	Assessments	Notes	Files	Forms			× Exit
Progra	am Ser	vice His	tory							LINK FROM HISTORY



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.



The exit screen:

- Project Exit Date
- Destination

Enrollment	History	Provide Services	Assessments Notes Files Forms	×
End Proar	am for	client Kellie CE	Test	
Program Exit	Date		01/11/2022	
Destination	Duto		Staving or living with family, permanent tenure	
Destination			Staying or living with family, permanent tenure	~
			SAVE & CLOSE CANCEL	





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**



Recap on Workflows



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.



Demo in Clarity







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.





- FY2022 HMIS Data Standards Dictionary: <u>https://files.hudexchange.info/resources/documents/FY-</u> 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://help.bitfocus.com/coordinated-entry-data-elements

- 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:





Coordinated Entry in CMIS/HMIS



