

# Coordinated Entry (CE) for Providers in CMIS/HMIS

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**Clarity Human Services Training**

Rural Nevada

March 2022

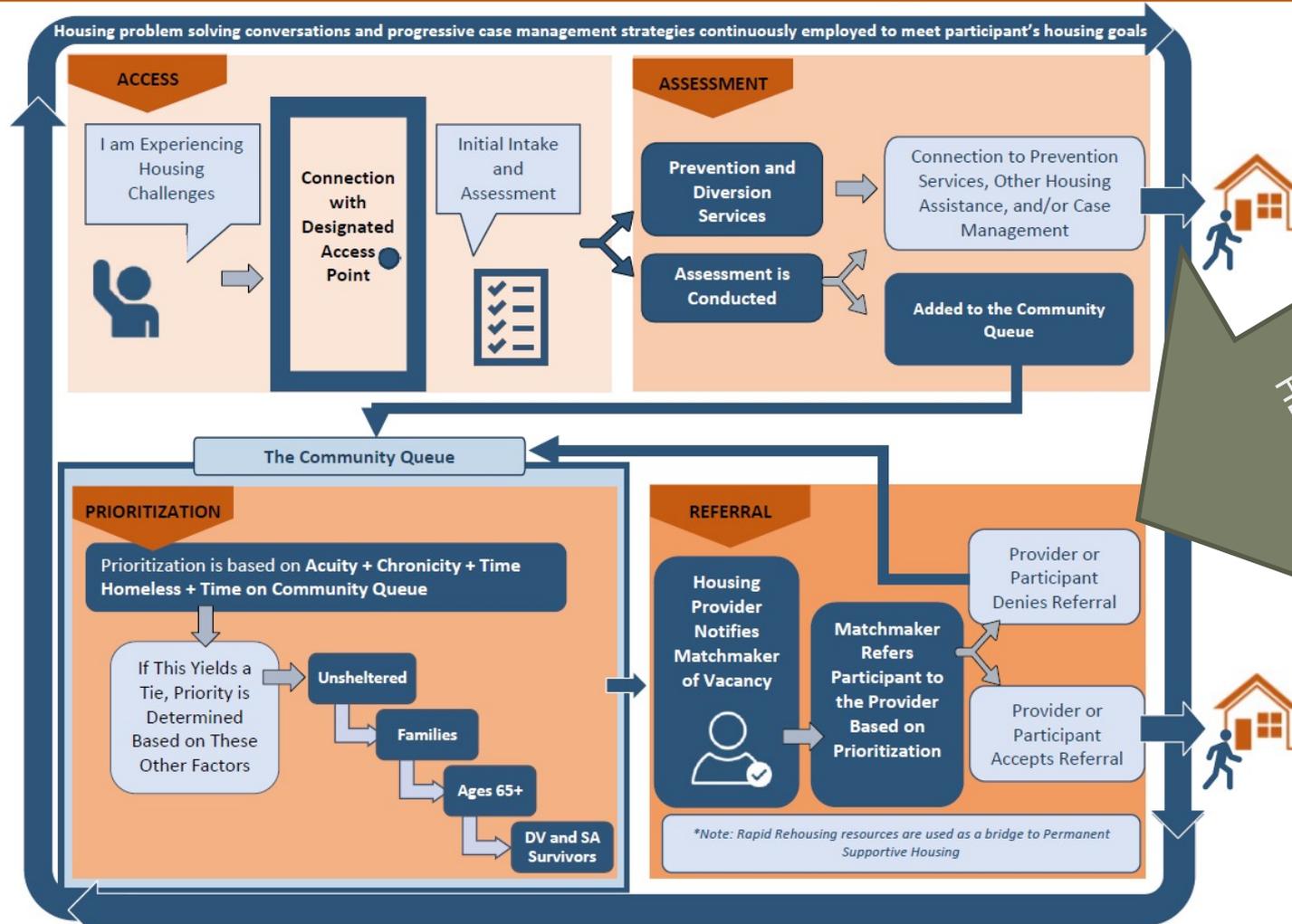


# Agenda

1. Coordinated Entry Basic Workflow
2. Accessing Referrals & Posting Available Resources
3. Managing Referrals
4. Accepting and Denying Referrals
5. Reports
6. Demo
7. Q&A

# Information from CoC Coordinator

# Rural Nevada Continuum of Care Coordinated Entry System



# CE 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.**

# Key Policies and Procedures

(pages 17-19, 29-30)

- **Follow the RNCoc Coordinated Entry System Policies & Procedures**
- **Maintain low barrier to enrollment in services and housing**
- **Maintain Fair and Equal Access**
- **Provide appropriate safety planning**
- **Create and share written eligibility standards**
- **Communicate vacancies**
- **Limit enrollment to participants referred through the defined access point(s).** All projects with HUD CoC-funded beds, units, or vouchers required to serve an individual or family experiencing homelessness are required to receive referrals through Coordinated Entry.

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# Key Policies and Procedures

**The Housing Matchmaker and CoC Coordinator are able to answer any requests for clarification and will usually refer these back to specific sections of the Policies and Procedures**  
If further clarity is required, (e.g., a dispute between providers or a review request) the Review Board may be convened

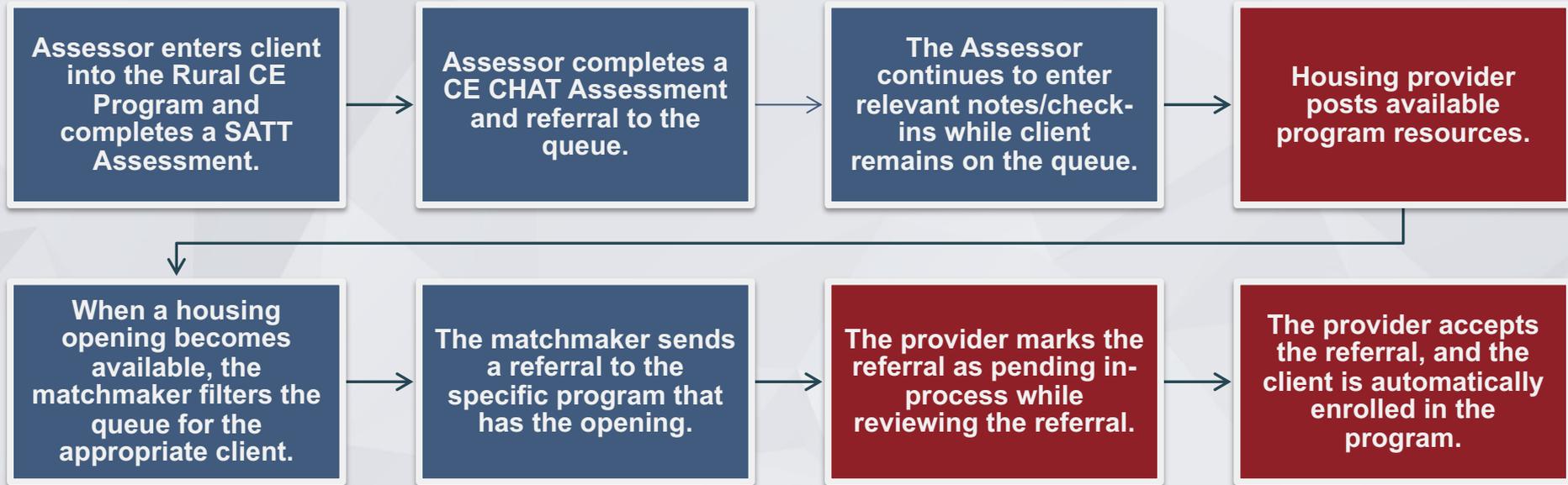
# CE APR

- Referral activity and their outcomes (including shelter referrals) is a metric included on the Coordinated Entry APR.
- The requirements for the APR were changed in 2020 and communities must generate a single CSV file that comes directly from HMIS.
- It is important for communities to have all of their Coordinated Entry data in HMIS, including referral activity and outcomes, so the data can be included in the CSV file that produces the Coordinated Entry APR.

# **Coordinated Entry Basic Workflow**

# CE Basic Workflow

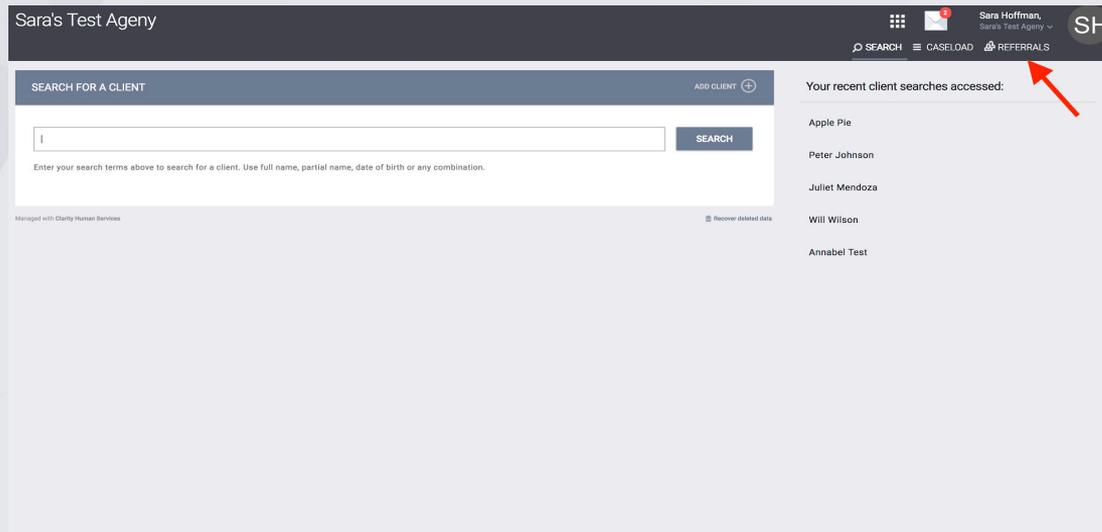
- **RED** boxes are Provider steps we will cover in this training.



# **Accessing Referrals & Posting Available Resources**

# Referrals Tab

- Click REFERRALS in the top right of your screen.
- The Referrals Tab will direct providers to the various screens needed to post resources and access referral information.



The screenshot shows a web application interface for "Sara's Test Agency". The top navigation bar includes a search icon, "CASELOAD", and "REFERRALS" (highlighted with a red arrow). The user profile "Sara Hoffman, Sara's Test Agency" is visible in the top right corner. Below the navigation bar, there is a "SEARCH FOR A CLIENT" section with a search input field and a "SEARCH" button. To the right, a section titled "Your recent client searches accessed:" lists several names: Apple Pie, Peter Johnson, Juliet Mendoza, Will Wilson, and Annabel Test. The bottom of the page features the text "Managed with Clarity Human Services" and "Recover deleted data".

# Posting Available Resources

- Navigate to Referrals → Availability
- Your agency's programs will show under the designated queue on the Availability Tab

Carson City Health & Human Services

Ashley Wynn,  
Carson City Health & Human Services

SEARCH CASELOAD REFERRALS

REFERRALS

Pending Community Queue Completed Denied Sent **Availability**

Program Availability

Community Queue Default

(CCHHS) Carson FASTT FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY

(CCHHS) Carson MOST FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY

There are no results

# Posting Available Resources

- Post resources under the program that has availability.
- Add a single opening or multiple openings.

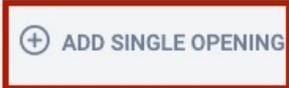
(CCHHS) ESG Rapid ReHousing Program      FULL AVAILABILITY      LIMITED AVAILABILITY      NO AVAILABILITY 

AVAILABLE OPENINGS

03/04/2022    Opening is for a single individual       

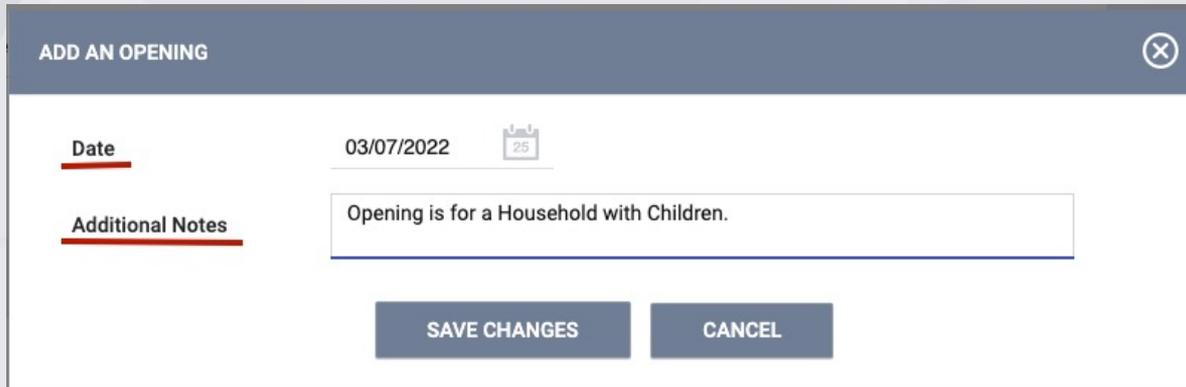
There are no reserved openings



# Posting Available Resources

- Complete the Availability Form.
- The date should reflect that date the opening is actually available.
- Characteristics that only apply to a specific opening should be listed in the notes box.
- Include as much information as possible to assist the matchmaker in making the most appropriate referral.



The screenshot shows a web form titled "ADD AN OPENING" with a close button in the top right corner. The form contains two main sections: "Date" and "Additional Notes".

**Date**: The date is set to 03/07/2022, with a calendar icon showing the 25th of the month.

**Additional Notes**: A text box contains the text "Opening is for a Household with Children."

At the bottom of the form are two buttons: "SAVE CHANGES" and "CANCEL".

# Managing Referrals

# Referral Notifications

- Referral notifications will be sent to assigned staff.
- If staff change, providers need to contact their system administrator or the Bitfocus Help Desk to change the staff assigned to the program.



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Dear Sara Hoffman,

[this client](#) has been referred to a program.

Please follow [this link](#) to view the new pending referral.

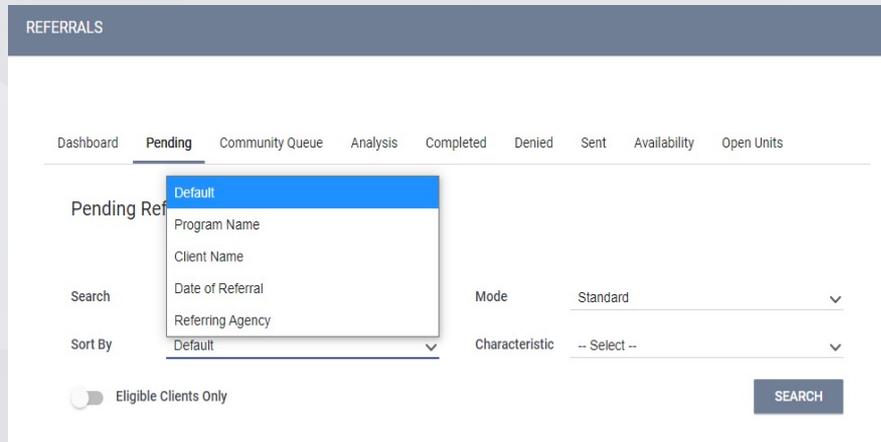
Professional Services Clarity System Team

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Questions? Visit our online wiki: [get.clarityhs.help](http://get.clarityhs.help)

# The Pending Tab

- The Pending Tab contains referrals still in process for the user's agency.
- Filter by program name, referral date, client name or referring agency.



The screenshot displays the 'REFERRALS' interface with the 'Pending' tab selected. A dropdown menu is open, showing filter options: 'Default', 'Program Name', 'Client Name', 'Date of Referral', and 'Referring Agency'. The 'Search' field is empty, and the 'Sort By' dropdown is set to 'Default'. The 'Mode' dropdown is set to 'Standard', and the 'Characteristic' dropdown is set to '-- Select --'. There is a toggle for 'Eligible Clients Only' and a 'SEARCH' button.

# Processing Referrals: Pending-in Process

- Pending in-process acknowledges the provider has received the referral.
- Update the status within a few days of receiving the referral.
- The matchmaker will receive a notification when the status is changed.

The screenshot displays a form for managing a referral. The form includes the following fields and values:

Referred to Agency	Sara's Test Agency
Referring Agency	Sara's Test Agency
Referred Date	12/19/2018 8:51 AM
Days Pending	7 day(s)
In Process	0 day(s)
Qualified	Reassigned
Adult Priority score	57
Referred by Staff	Sara Hoffman
Case Manager	Select
Last Activity	12/19/2018 <input type="button" value="CHECK-IN"/>
Status	<input checked="" type="checkbox"/> Pending <input type="checkbox"/> Pending - In Process <input type="checkbox"/> Denied <input type="checkbox"/> Expired
Private	

At the bottom of the form are two buttons:  and .

Below the form is a dark blue bar with the text "REFERRAL CONNECTIONS".

# RN Community Referral Threshold

- If a referral stays in pending for more than 30 days, the client will be sent back to the queue and the referral will expire.

# Accepting & Denying Referrals

# Accepting Referrals

- Enroll the client to complete/accept the referral simultaneously.
- The orange pending referral box let's you know you're enrolling in the right program.
- The "Program placement a result of..." toggle must be enabled.

**PROGRAM AVAILABILITY:**

▸ Available openings 2

**HOUSING AVAILABILITY:**

▸ Households without children 30 Beds in 30 Units

Program Placement a result of Referral provided by SFHOT Practice Agency

**Include group members:**

First Last

Castro Valley

1 pending referral(s). Oldest 116 days.

**DOC REQUIREMENTS**

**ENROLL**

# Linking Enrollment to a Referral

- The chain link icon indicates that the enrollment is linked to a referral.

Bruce Spruce

PROFILE HISTORY SERVICES PROGRAMS NOTES ASSESSMENTS FILES CONTACT LOCATION REFERRALS

HISTORY

Advanced Search Options View ▾

Service Name	Start Date	End Date
<b>Referral:</b> Denali Transitional Housing Gartner Agency referral to Gartner Agency ⓘ	06/22/2020	06/22/2020
Denali Transitional Housing Gartner Agency ⓘ	06/22/2020	Active 

# Move-In Dates

- Move-in dates should be entered on the enrollment screen.
  - PSH programs: the move-in date is typically the same as the enrollment date.
  - RRH: the move-in date should reflect the date the client actually moved into housing.

Enroll Program for client Bitfocus Test

Project Start Date 07/20/2020 

Anticipated Length of subsidy - no of months

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

Is the Program Type a Permanent Housing Program Type? Yes (Automatically Generated Response)

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date  

Unit Number

Address

City

Zipcode 94102

PRIOR LIVING SITUATION

Type of Residence Emergency shelter, including hotel or motel paid for with emergency shelter

Length of Stay in Prior Living Situation One month or more, but less than 90 days

# Denying a Referral

- Matchmakers are notified when a referral has been denied.
- Four additional fields will populate:
  - Send to Community Queue
  - Denied by type
  - Denied Reason
  - Denial Information

Status	Denied <input type="button" value="v"/>
Send to Community Queue	-- Select -- <input type="button" value="v"/>
Denied By Type	-- Select -- <input type="button" value="v"/>
Denied Reason	Select <input type="button" value="v"/>
Denial Information	<input type="text"/>

# Relevant Reports

# Referral Statistics Report

- [RFRL-103] Referral Statistics - Inbound (Community and Referral Reports)
  - Who's been referred to your agency
  - Number of referrals received by an agency
  - Status of referrals

# Referral Statistics Report

<b>Referral Statistics</b>		<b>Sarah Smith Housing Services</b>	
Dates Between:		05/01/2018 and 12/27/2018	
Referral Direction:		Outbound	
<b>Number of Agency referrals received</b>			
	3		
<b>Pending Referrals</b>			
Number of pending referrals			
	1		
Oldest pending referral in days			
	83		
Newest pending referral in days			
	83		
Average pending referral in days			
	83		
<b>Pending - In Process Referrals</b>			
Number of pending referrals			
	0		
Oldest pending referral in days			
	0		
Newest pending referral in days			
	0		
Average pending referral in days			
	0		
<b>Completed Referrals</b>			
Number of referrals resulting in Program enrollment			
	1		
Longest time to connect referral in days			
	53		
Shortest time to connect referral in days			
	53		
Average time to connect referral in days			
	53		
<b>Denied Referrals</b>			
Number of denied referrals			
	1		
Longest time to deny a referral in days			
	28		
Shortest time to deny a referral in days			
	28		
Average time to deny a referral in days			
	28		
<b>Breakdown Of Most Common Denied Referral Reasons</b>			
Client refused services			
	1		

## Breakdown Of Referred Programs

NOTE: P - Pending; P/I - Pending - In process; A - Accepted; D - Denied.

PH - Permanent Supportive Housing (disability required)					
Agency Name	Program Name	P	P/I	A	D
Sarah Smith Housing Services	Test PSH Program	1	0	0	0
Sarah Smith Housing Services	Youth Hope Housing	0	0	0	1

PH - Rapid Re-Housing					
Agency Name	Program Name	P	P/I	A	D
Housing Test Agency	Rapid Rehousing	0	0	1	0

Thu Dec 27 06:35:56 AM 2018

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HUMAN SERVICES

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# Program Roster

- [GNRL-106] Program Roster (Program Based Report)
  - Who's stayed in the program
  - Lists program stay information for clients with the selected status in the selected program

# Program Roster

## Program Roster Report

### Sarah Smith Housing Services

Active within [08/01/2018 - 12/27/2018]

Housing Move-in: Undefined = Unknown HoH or Move-in is Null,  = Non PH Project

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	Assess-ments	Services	Assigned Staff
<b>Program: Youth Hope Housing</b>											
Test, Visibility	00948F75C	01/01/1998	20	20	12/18/2018	-	10	undefined	0	0	S. Dougherty

Total: 1

Program Name	Project Type	Project Applicability
Youth Hope Housing	PH - Permanent Supportive Housing (disability required)	Permanent Housing for Disabled Homeless Persons [SHP-PH]

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HUMAN SERVICES

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# Program Details Report

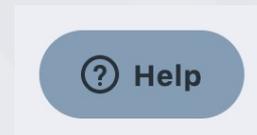
- [GNRL-220] Program Details Report
  - Who's enrolled in the project
  - Returns all the fields and corresponding responses for selected screens.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Unique ID	First Name	Last Name	Agency	Assigned Staff	Staff Created	Enrollment Start Date	Enrollment Exit Date	Chronic Homeless	Housing Service	Housing Service Start Date	Housing Service End Date	DOB	SSN	Personal
2	19C94E6C0	Peter	Pine	[TRAINING] HSH: SFHOT	Aaron Court	Aaron Court	08/05/2020		N				08/03/1982	332-21-2212	919
3	74E0A28D6	Rose	Bush	[TRAINING] HSH: SFHOT	Aaron Court	Aaron Court	08/07/2020		Y				01/01/1996	888-99-9898	993
4															
5															
6															
7															
8															
9															
10															
11															
12															
13															
14															

# Demo in Clarity

# 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, help.bitfocus.com:**  
<https://help.bitfocus.com/coordinated-entry-data-elements>
- **Bitfocus Helpdesk**
  - [nevada@bitfocus.com](mailto: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

**Q&A**