

Santa Clara County Community Hotline Workflow Training

April 2024



Agenda

- Introductions
- What is the Community Hotline?
- DVAC Screening
- Entering Data in HMIS
 - Switch
 - Search
 - ROI
 - Review History
 - Enrollment
 - Housing Problem Solving
 - Triage/Referral
 - Exit
- Q&A



Introductions





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Community Administration



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Deputy Project Administrator
Community Administration



What is the Community Hotline?



What is the Community Hotline?

- Countywide hotline for homeless shelter services
- Call center for persons seeking:
 - Access to shelter placement
 - Transportation to a program location
 - Housing Problem Solving services
 - Coordinated Assessment System access
 - Information and referral services

DVAC Screening



DVAC Screening

- Helps to identify persons who may be in need of services geared toward domestic violence survivors
- Completed during the first phone call with the client



DVAC Screening, cont'd.

- If the client is fleeing domestic violence, ask if they are interested in speaking with the DV Hotline.
 - If so, transfer the client to the DV Hotline
 - DV Hotline meets the client's needs; or
 - DV Hotline refers the client back to the Community Hotline.
 - Continue with the process in HMIS.
 - If not, continue with the process in HMIS.

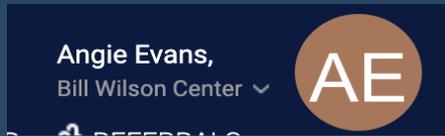
Entering Data in HMIS



Entering Data in HMIS - Switch

After logging in to HMIS, “switch” to the Community Hotline agency.

- Locate and click on the down arrow next to the agency underneath your name in the top right corner of the screen



- Select “Community Hotline” from the list of agencies that appears.



Entering Data in HMIS - Search

- Search for the client

- If found, click the “Edit” icon next to their name



- If not found, create their profile

Entering Data in HMIS - ROI

Make sure there is an active Release of Information (ROI) in the client's record

- Click the Privacy Shield icon



- If there is no active (i.e., has not expired) ROI, click “Add Release of Information”



Entering Data in HMIS - ROI, cont'd.

1. Select “Yes” from the Permission picklist
2. Ensure the Start Date is the date the client signed the ROI
3. Adjust the End Date to the date indicated on the ROI form
4. Select “Attached pdf” or "Electronic Signature" from the Documentation picklist. Electronic signature can only be used when client can sign the form with a trackpad or stylus.
5. Click “Select File” and follow the instructions to upload the pdf of the signed consent

Permission	1	Yes	▼
Start Date	2	09/20/2021	📅
End Date	3	09/20/2024	📅
Documentation	4	Attached PDF	▼
File	5	<input type="button" value="Select File"/>	



Entering Data in HMIS - ROI, cont'd.

- Once you've uploaded the pdf of the signed consent, click "Save Changes"

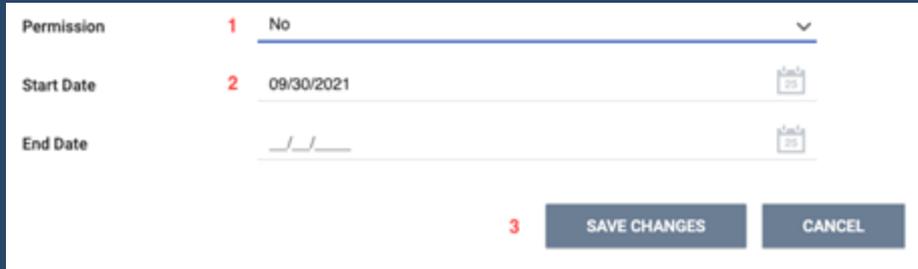


SAVE CHANGES

Entering Data in HMIS - ROI, cont'd.

In cases where the client refuses to have their information shared in HMIS, select “No” from the Permission picklist and de-identify the client’s record

1. Select “No” from the Permission picklist
2. Change the Start Date, if necessary, to the date of the call with the client. Do not adjust the End Date
3. Click “Save Changes”



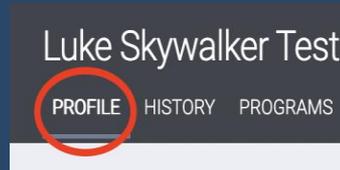
The screenshot shows a form with three rows of input fields. The first row is labeled 'Permission' and has a red '1' to its left; the value is 'No' and there is a dropdown arrow. The second row is labeled 'Start Date' and has a red '2' to its left; the value is '09/30/2021' and there is a calendar icon. The third row is labeled 'End Date' and has a red '3' to its left; the value is blank and there is a calendar icon. At the bottom right, there are two buttons: 'SAVE CHANGES' and 'CANCEL'. A red '3' is positioned to the left of the 'SAVE CHANGES' button.



Entering Data in HMIS - ROI, cont'd.

De-identify the client's record:

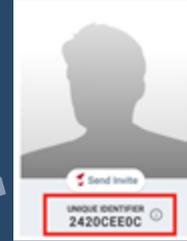
- Click on the client's "Profile" tab



- Change the client's SSN to all zeros
- Change the SSN Data Quality field to "Client doesn't know"
- Change the client's DOB to 01/01/[year of birth]
- Change the DOB Data Quality field to "Approximate or partial DOB reported"

Entering Data in HMIS - ROI, cont'd.

- Change the client's First Name to the letter O
- Change the client's Last Name to the Unique Identifier created by Clarity
- Click "Save Changes"



- Make a note of the client's name and Unique Identifier, so you can easily access the client's record in Clarity by searching for the Unique Identifier

Entering Data in HMIS - ROI, cont'd.

In cases where the client's consent cannot be obtained at the time of the call (but the client has not explicitly declined consent), enter the client anonymously and update their profile once consent has been obtained. Upload the ROI to the client's record once it has been signed.



Entering Data in HMIS - Review History

Review the client's global History tab. Look for:

- Active enrollment in the Community Hotline Project

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
Community Hotline Project Coordinated Entry [TRAINING] Community Hotline ⓘ	09/02/2021	Active	Individual

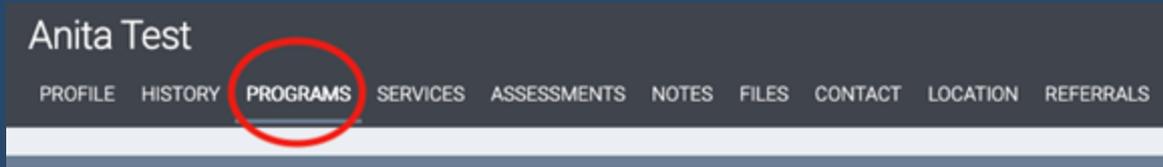
- If an active enrollment exists, access and work within that enrollment
- If an active enrollment does not exist, begin one



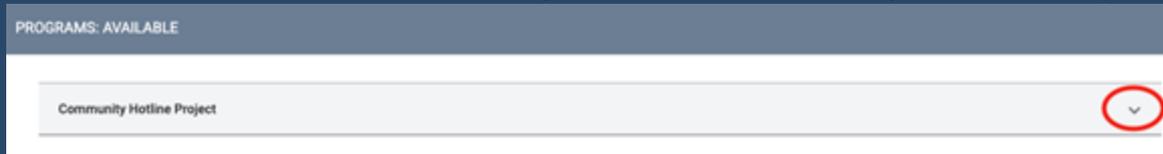
Entering Data in HMIS - Enrollment

If there is no active Community Hotline enrollment in the client's record, create one:

- Click on the global “Programs” tab

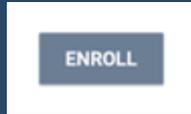


- Click on the down arrow to the right of the Community Hotline Project

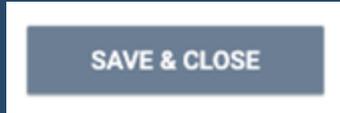


Entering Data in HMIS - Enrollment, cont'd.

- Click on “Enroll”



- Complete the enrollment screen and click “Save & Close”



Note: Enroll the client/head of household only. Do not enroll other household members, if any.

Luke Skywalker Test

PROFILE HISTORY **PROGRAMS** SERVICES NOTES ASSESSMENTS FILES LOCATION CONTACT REFERRALS

Enrollment History Events Assessments Notes Files

× Exit

Enroll Program for client Luke Skywalker Test

Program Date 02/07/2024 

TRANSLATION ASSISTANCE NEEDED

WOULD THE CLIENT LIKE SERVICES TO BE PROVIDED IN A LANGUAGE OTHER THAN ENGLISH?

Translation Assistance Needed Yes

Preferred Language Spanish

THE FOLLOWING QUESTIONS WILL HELP US UNDERSTAND YOUR HOUSING SITUATION

Current Housing Situation Long-term care facility or nursing home

Length of Stay in Current Housing Situation One year or longer

Length of Stay Less Than 90 Days No

DISABLING CONDITIONS AND BARRIERS

Disabling Condition No

MONTHLY INCOME AND SOURCES

Income from Any Source No

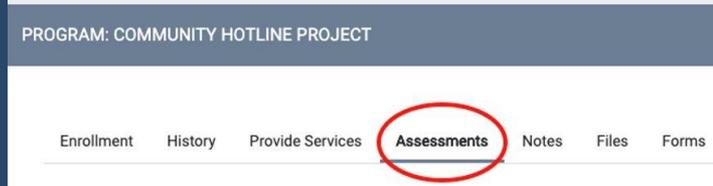
Don't forget to ask clients about their income!

Where did the client sleep last night? Where will they sleep tonight?

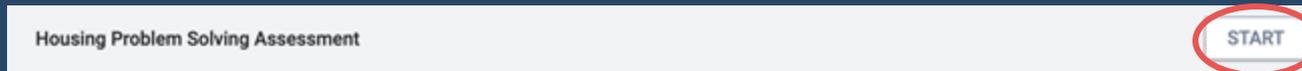


Entering Data in HMIS - Housing Problem Solving Assessment

- After enrollment, complete Housing Problem Solving (HPS) Assessment
- Click on the project-level “Assessments” tab



- Click “Start” to the right of the Housing Problem Solving Assessment



Entering Data in HMIS - Housing Problem Solving Assessment

- Complete the Housing Problem Solving Assessment screen
- If the client is eligible for prevention, you will see a notice that “Client is at 80% AMI or lower” for their household size, and the final question will ask which homelessness prevention services agency they’d like to be referred to

CLIENT IS AT 80% AMI OR LOWER FOR A 1-PERSON HOUSEHOLD

Which Homelessness Prevention Services Agency Would You Like to be Referred To? 



Entering Data in HMIS - Housing Problem Solving Assessment

- After saving the Housing Problem Solving Assessment, you will see the Eligibility Determination screen with instructions for next steps

If eligible for prevention services, please refer the client to the appropriate prevention agency listed below.

If the client is NOT going to receive Housing Problem Solving services, DO NOT refer the client to the Housing Problem Solving Queue. Complete the Community Hotline Triage/Referral Assessment. ← *Covered later in this training*

If the client is going to receive Housing Problem Solving services, refer the client to the Housing Problem Solving Queue.

Housing Problem Solving Queue

REFER DIRECTLY TO COMMUNITY QUEUE(S)



Entering Data in HMIS - Housing Problem Solving Assessment

- Don't forget this last step!

REFERRAL: ADD TO CQ

Referral Date	04/17/2024 
Send to Queues	Housing Problem Solving Queue
Referred Program	Community Queue
Referred to Agency	Community Queue
Referring Agency	Community Hotline
Private	<input type="checkbox"/>

B *I*  

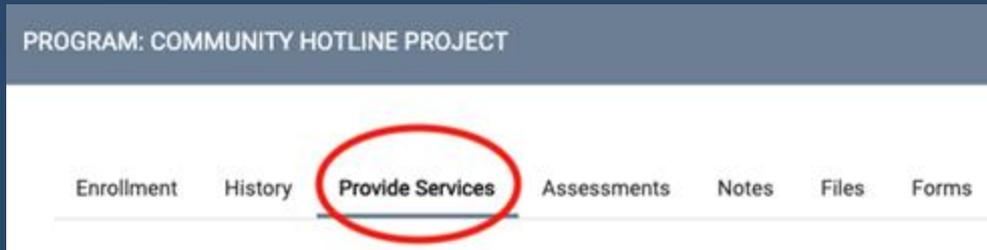
SEND REFERRAL CANCEL



Entering Data in HMIS – HPS Services

To provide services:

- Click on the project-level “Provide Services” tab



Entering Data in HMIS – HPS Services

Luke Skywalker

PROFILE HISTORY **PROGRAMS** SERVICES NOTES ASSESSMENTS FILES LOCATION CONTACT REFERRALS

PROGRAM: COMMUNITY HOTLINE PROJECT

Enrollment History **Provide Services** Events Assessments Notes Files × Exit

Services

BWC Fiscal Review Decision	Financial
Contact Attempt	Housing Search and Placement
Financial Assistance Request Status	Financial
Housing Problem Solving Attempted	Case Management
Housing Problem Solving Contact Attempt	Case Management
Housing Problem Solving Financial Assistance	Financial
Housing Problem Solving Mediation	Case Management
Transportation	Transportation
Voicemails	Case Management



Entering Data in HMIS – HPS Services

Once the client is selected for Housing Problem Solving, provide appropriate services to the client throughout their engagement.

➤ **Types of Housing Problem Solving Services:**

- Housing Problem Solving Attempted
- Housing Problem Solving Contact Attempt
- Housing Problem Solving Mediation
- Housing Problem Solving Financial Assistance

The final two service types are used by management only, and should not be entered directly by hotline/HPS staff:

- Financial Assistance Request Status
- BWC Fiscal Review Decision



Entering Data in HMIS – HPS Services

- Housing Problem Solving Attempted
 - In Person
 - Phone Call

Provide the “Housing Problem Solving Attempted” service each time you have a conversation with the client exploring HPS options, whether in person or over the phone (i.e. three different conversations exploring HPS options would result in three “Housing Problem Solving Attempted” services).

This service entry will also ask information on the length of time (in minutes) you spend having each conversation with the client.



Entering Data in HMIS – HPS Services

- **Housing Problem Solving Mediation**
 - Mediation with Employer
 - Mediation with Family/Friends
 - Mediation with Landlord
 - Mediation with Roommate
 - Mediation with RRH/PSH Housing Program
 - Other Mediation (specify in notes)

Provide the appropriate “Housing Problem Solving Mediation” service each time mediation takes place with any of the parties (i.e. two mediation conversations with a landlord would result in two “Mediation with Landlord” services).

This service entry will also ask information on the length of time (in minutes) you spend mediating each time.



Entering Data in HMIS – HPS Services

- **Housing Problem Solving Financial Assistance**
 - Requested – Move-in costs (e.g. deposit, first month’s rent, moving supplies, moving truck, storage)
 - Requested – Rental application fees (including payments for background and credit checks)
 - Requested – Fees for securing ID documents (such as birth certificates, social security cards)
 - Requested - Transportation (e.g., bus tickets for local transport or to relocate to verifiable, safe housing out-of-the-area, car repair for ending homelessness - such as travel from temporary/permanent housing to school/work)
 - Requested - Previous housing debt/rental arrears to facilitate an immediate housing placement
 - Requested - Utility deposits or utility arrears needed to secure housing
 - Requested - Certifications or license fees related to employment
 - Requested - Household expenses (e.g., groceries, cleaning supplies)
 - Requested - Fees for temporary childcare or other children's activities
 - Requested - Other financial assistance (specify in notes)

Provide the appropriate “Housing Problem Solving Financial Assistance - Requested” service each time you are requesting any financial assistance for the client. Specify the exact expense in the notes and describe how the financial assistance will help address the client’s immediate housing needs.



Entering Data in HMIS – HPS Services

The final two service types are used by management only, and should not be entered directly by Hotline/HPS staff:

➤ Financial Assistance Request Status

- Approved
- Denied

Indicates the preliminary approval or denial of a “Housing Problem Solving Assistance – Requested” service entered by hotline/HPS staff

➤ BWC Fiscal Review Decision

- Approved
- Denied

Indicates the final fiscal approval or denial of a “Housing Problem Solving Assistance – Requested” service after a “Financial Assistance Request Status – Approved” service has been entered by the appropriate manager



Entering Data in HMIS – HPS Services

- Housing Problem Solving Financial Assistance
 - Fulfilled – Move-in costs (e.g. deposit, first month’s rent, moving supplies, moving truck, storage)
 - Fulfilled – Rental application fees (including payments for background and credit checks)
 - Fulfilled – Fees for securing ID documents (such as birth certificates, social security cards)
 - Fulfilled - Transportation (e.g., bus tickets for local transport or to relocate to verifiable, safe housing out-of-the-area, car repair for ending homelessness - such as travel from temporary/permanent housing to school/work)
 - Fulfilled - Previous housing debt/rental arrears to facilitate an immediate housing placement
 - Fulfilled - Utility deposits or utility arrears needed to secure housing
 - Fulfilled - Certifications or license fees related to employment
 - Fulfilled - Household expenses (e.g., groceries, cleaning supplies)
 - Fulfilled - Fees for temporary childcare or other children's activities
 - Fulfilled - Other financial assistance (specify in notes)

Finance staff will provide the appropriate “Housing Problem Solving Financial Assistance - Fulfilled” service after payment for the request has been sent.



Entering Data in HMIS – HPS "Events"

- **Events: Housing Problem Solving Connection to Services**
 - Alcohol and/or Substance Use Services
 - Child Care Services (non-financial)
 - Education Services
 - Employment Services
 - Food Bank or Clothing
 - Legal Assistance
 - Mental Health/Counseling Resource
 - Physical Disability Services
 - Other Resources (specify in notes)

Provide the appropriate “Housing Problem Solving Connection to Services” event each time you provide a referral to the client for any of the service categories.



Entering Data in HMIS – HPS "Events"

PROGRAM: COMMUNITY HOTLINE PROJECT

Enrollment History Provide Services **Events** Assessments Notes Files ✕ Exit

Coordinated Entry Events

Referral to Prevention Assistance project ▼

Problem Solving/Diversion/Rapid Resolution intervention or service ▼

- Problem Solving/Diversion/Rapid Resolution intervention or service ▼
- Housing Problem Solving Connection to Services: Alcohol and/or Substance Use Services ▼
- Housing Problem Solving Connection to Services: Child Care Services (non-financial) ▼
- Housing Problem Solving Connection to Services: Education Services ▼
- Housing Problem Solving Connection to Services: Employment Services ▼
- Housing Problem Solving Connection to Services: Food Bank or Clothing ▼



Entering Data in HMIS - HPS Exit

Clients should be exited from the Community Hotline Project and removed from the Housing Problem Solving Queue when one of the following occurs:

- You have made 3 attempts to contact the client to discuss Housing Problem Solving options but have not spoken with them; or
- The client successfully achieves stable housing

Clients should be removed from the Housing Problem Solving Queue only and remain in the Community Hotline Project when the following occurs:

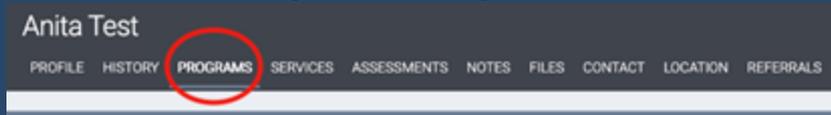
- No solution is identified after two attempted Housing Problem Solving conversations (i.e. client is still in need of emergency shelter triage)



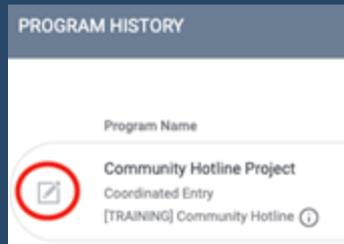
Entering Data in HMIS - HPS Exit, cont'd.

To exit a client from the Community Hotline Project:

- Click on the client's global "Programs" tab

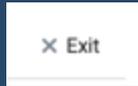


- Click the "Edit" icon next to the open Community Hotline Project record in the Program History section

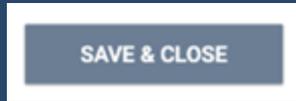


Entering Data in HMIS - HPS Exit, cont'd.

- Click on the “Exit” tab



- Complete the Exit screen and click “Save & Close”.

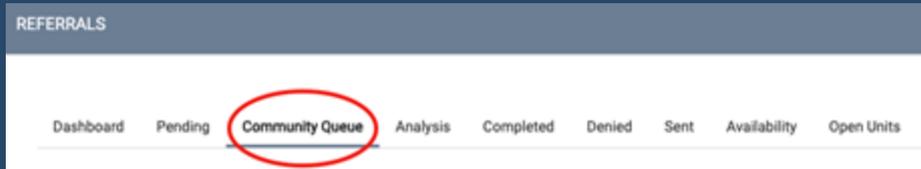


Entering Data in HMIS - Removing a Client from HPS Queue

- If a client exits the Community Hotline Exit to a permanent housing destination, they will automatically be removed from the HPS Queue
- If you haven't reached the client after making 3 attempts or have not identified a solution after two Housing Problem Solving attempts, you will need to remove the client from the HPS Queue
 - Click on the “Referrals” tab in the top right corner of the screen



- Click on the “Community Queue” tab

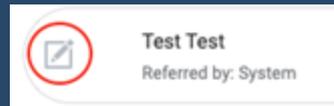


Entering Data in HMIS - Removing a Client from HPS Queue, cont'd.

- Select the Housing Problem Solving Queue



- Locate the client and click the “Edit” icon that appears when you mouse over their name



Entering Data in HMIS - Removing a Client from HPS Queue, cont'd.

1. In the Remove from Queue section, from the “Reason for Removal” picklist:
 - Select “Whereabouts Unknown” if you have not been able to contact the client after three attempts
 - Select “Other” if no solution is identified after two attempted Housing Problem Solving conversations
2. Enter the “Queue Removal Date”
3. Click “Save Changes”

The screenshot shows a web form titled "REMOVE FROM QUEUE". It contains two input fields: "Reason for Removal" with a dropdown menu and "Queue Removal Date" with a calendar icon. The "Reason for Removal" dropdown is circled in red and labeled with a red "1". The "Queue Removal Date" field is boxed in red and labeled with a red "2". The "SAVE CHANGES" button is boxed in red and labeled with a red "3". The "CANCEL" button is also visible.



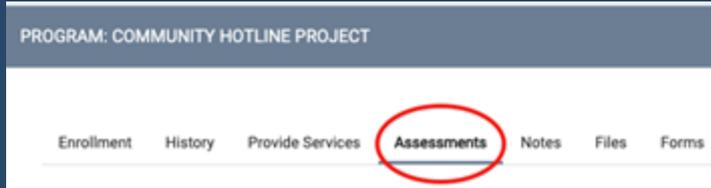
Entering Data in HMIS - Triage/Referral Assessment

Next you will Community Hotline Triage/Referral Assessment in order to help your client get enrolled in a shelter program.

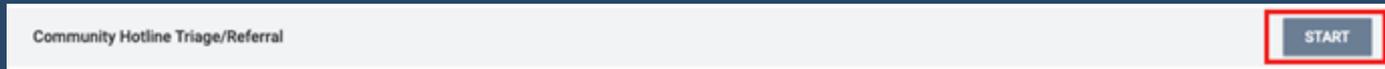


Entering Data in HMIS - Triage/Referral Assessment, cont'd.

- Click on the project-level “Assessments” tab



- Click “Start” to the right of the Community Hotline Triage/Referral Assessment



Entering Data in HMIS - Triage/Referral Assessment, cont'd.

- Complete the Community Hotline Triage/Referral Assessment screen and click “Save & Close”



Entering Data in HMIS - Triage/Referral Assessment, cont'd.

- After saving the Triage/Referral Assessment, you will see the Eligibility Determination screen

PROGRAM ELIGIBILITY DETERMINATION

Refer the client to the appropriate Emergency Housing Queue(s).

Emergency Shelter Queue - Households With Children

Emergency Shelter Queue - Households Without Children

REFER DIRECTLY TO COMMUNITY QUEUE(S)

Entering Data in HMIS - Emergency Shelter Referrals

➤ Select the Emergency Shelter Queue(s) on which the client will be placed

- Emergency Housing Queue - Households With Children: There is at least one person over 18 years of age and at least one person under 18 years of age in the household



- Emergency Housing Queue - Households Without Children: All persons in the household are 18 years of age or older



➤ In some cases, clients will need to be placed on both Queues



Entering Data in HMIS - Emergency Shelter Referrals, cont'd.

- Once the appropriate Emergency Housing Queue(s) has/have been selected, click on “Refer Directly to Community Queue(s)”

REFER DIRECTLY TO COMMUNITY QUEUE(S)

- On the Referral: Add to CQ page, add any necessary or appropriate notes in the text box, then click “Send Referral”.

SEND REFERRAL



Entering Data in HMIS - Referring from the Emergency Housing Queue(s)

- Emergency shelter providers will report vacancies/capacity on a daily basis
- Contact the client to discuss an emergency shelter opening and determine eligibility and interest in the opening
 - Make up to 3 attempts to contact the client
 - If you do not reach the client after 3 calls, remove the client from the Emergency Shelter Queue(s)* and exit** the client from the Hotline Project.

*Removing a client from the Emergency Shelter Queue(s) will be covered later.

**Exiting a client from the Hotline Project will be covered later.



Entering Data in HMIS - Triage Services

PROGRAM: COMMUNITY HOTLINE PROJECT

Enrollment History Provide Services Events Assessments Notes Files × Exit

Services

BWC Fiscal Review Decision	Financial ▼
Contact Attempt	Housing Search and Placement ▼
Financial Assistance Request Status	Financial ▼
Housing Problem Solving Attempted	Case Management ▼
Housing Problem Solving Contact Attempt	Case Management ▼
Housing Problem Solving Financial Assistance	Financial ▼
Housing Problem Solving Mediation	Case Management ▼
Transportation	Transportation ▼
Voicemails	Case Management ▼



Entering Data in HMIS - Triage Services

Provide appropriate services to the client throughout their engagement.

- **Types of Services:**
 - Contact Attempt
 - Transportation
 - Voicemails



Entering Data in HMIS - Triage Services, cont'd.

- **Contact Attempt**
 - Attempt #1
 - Attempt #2
 - Attempt #3

Provide the Contact Attempt service when you have attempted to reach the client to discuss an emergency shelter opening and want to determine if the client is eligible for and interested in being referred to that shelter.



Entering Data in HMIS - Triage Services, cont'd.

- Transportation
 - Transportation Provided
 - Transportation Requested

Provide the Transportation service when the client has requested transportation to an emergency shelter (“Transportation Requested”) and if the client is provided with transportation to an emergency shelter (“Transportation Requested”).



Entering Data in HMIS - Triage Services, cont'd.

- **Voicemails**
 - VM From Client Logged
 - VM Left for Client

Provide the Voicemails service when you leave a voicemail for the client (“VM Left for Client”) and when you receive and listen to a voicemail from the client (“VM From client Logged”).



Entering Data in HMIS - Triage Events, cont'd.

PROGRAM: COMMUNITY HOTLINE PROJECT

Enrollment History Provide Services **Events** Assessments Notes Files × Exit

Coordinated Entry Events

- Referral to Prevention Assistance project
- Problem Solving/Diversion/Rapid Resolution intervention or service
- Referral to scheduled Coordinated Entry Crisis Needs Assessment
- Referral to scheduled Coordinated Entry Housing Needs Assessment
- Referral to post-placement/follow-up case management
- Referral to Street Outreach project or services
- Referral to Housing Navigation project or services



Entering Data in HMIS - Triage Events, cont'd.

➤ Coordinated Entry Event

- Problem Solving/Diversion/Rapid Resolution intervention or service
- Referral to Housing Navigation project or services
- 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 project or services

Provide the Coordinated Entry Event service when you provide the client with any of the above referrals.



Entering Data in HMIS - Exit

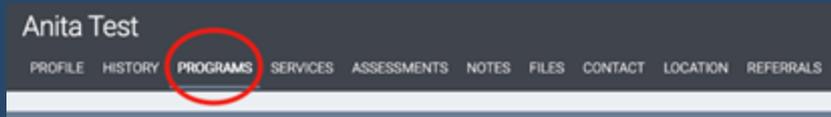
Clients should be exited from the Community Hotline Project and removed from the ES Queue when one of the following occurs:

- You have made 3 attempts to contact the client to discuss an emergency shelter opening but have not spoken with them; or
- The client does not arrive at the emergency shelter to which they were referred within 48 hours; or
- The client is enrolled in the emergency shelter to which they were referred.

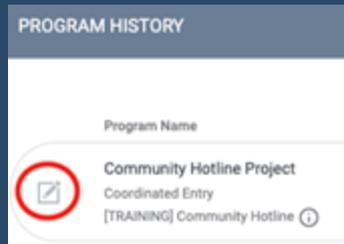
Entering Data in HMIS - Exit, cont'd.

To exit a client from the Community Hotline Project:

- Click on the client's global "Programs" tab

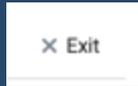


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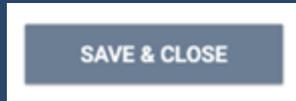


Entering Data in HMIS - Exit, cont'd.

- Click on the “Exit” tab



- Complete the Exit screen and click “Save & Close”.



Demo in HMIS



Questions



Bitfocus

