

Coordinated Entry Changes

June 2020



Agenda

- Overview of Changes to Coordinated Entry in Clarity
- Coordinated Assessment Workflow
- Demo in Clarity
- Recap & Resources
- Q&A

Overview of Changes in Coordinated Entry

- Coordinated Entry Assessments will no longer appear in the client level assessments tab. All Coordinated Entry Assessments will be recorded within a program enrollment.
- Assessment Only agencies will be required to complete an enrollment into a Coordinated Entry program.
- The Current Living Situation assessment must be recorded for adults at enrollment.

Coordinated Entry in HMIS

~~Changes go into effect~~

~~April 1, 2020~~

Changes will go into effect

July 1, 2020

Coordinated Assessment Workflow

Let's get started!

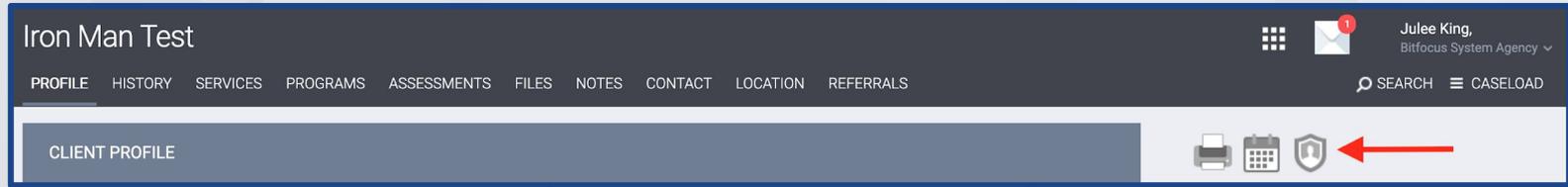
Coordinated Assessment Workflow

1. Search for the individual and review the ROI.
1. Check for any previously recorded Coordinated Entry Assessments.
1. Configure their Household.
1. Enroll in Coordinated Entry project **OR** Emergency Shelter/Street Outreach/Safe Parking/Services Only or UPLIFT.
1. Complete the Current Living Situation Assessment.
1. Record the Coordinated Entry Assessment (VI-SPDAT/VI-F-SPDAT).

Coordinated Assessment Workflow

1) 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
- Complete this step for every member of the household.



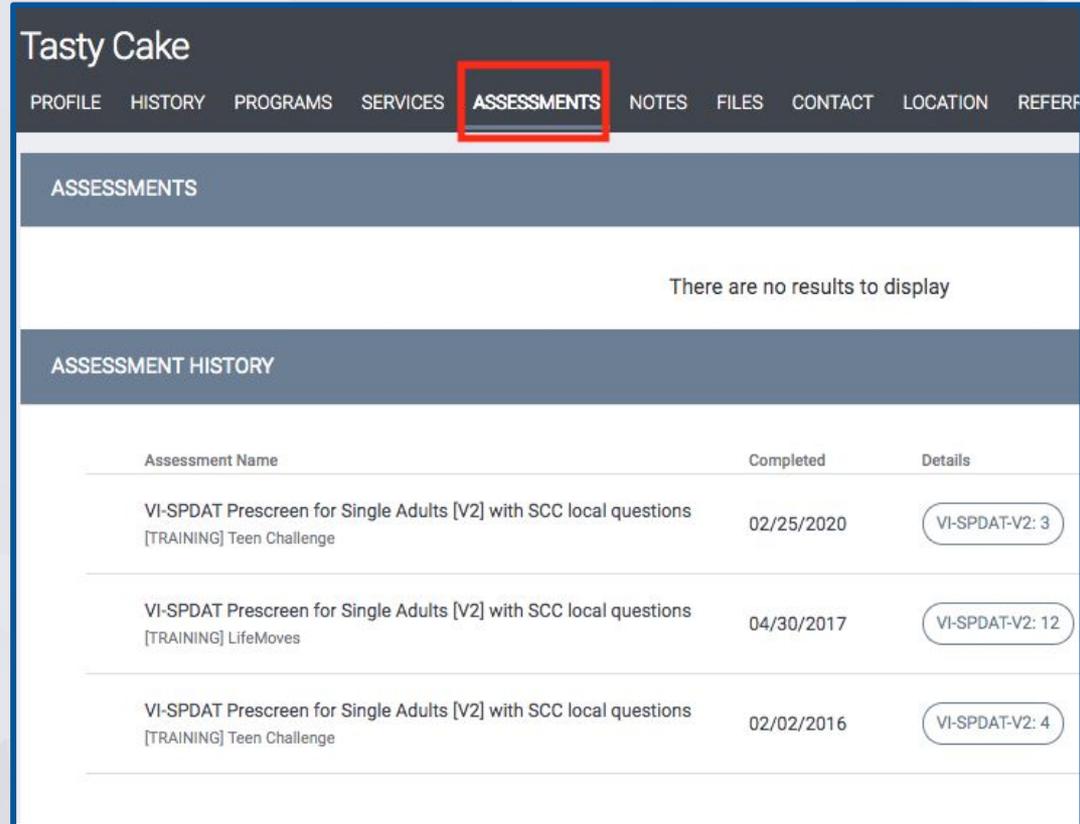
The screenshot shows a software interface for a client named "Iron Man Test". The top navigation bar includes tabs for PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, FILES, NOTES, CONTACT, LOCATION, and REFERRALS. The user is identified as "Julee King, Bitfocus System Agency". A search bar and "CASELOAD" button are also visible. Below the navigation bar, the "CLIENT PROFILE" section is active. In the top right corner of this section, there are three icons: a printer, a calendar, and a shield with a person silhouette. A red arrow points to the shield icon.



Coordinated Assessment Workflow

2) Check to see if a Coordinated Entry Assessment was recorded for any adult in the last year.

* If a VI-SPDAT, VI-F-SPDAT, or VI-Y-SPDAT is already recorded, there is no need to record a new assessment unless the person expressed they've experienced a significant change.



Tasty Cake

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

ASSESSMENTS

There are no results to display

ASSESSMENT HISTORY

Assessment Name	Completed	Details
VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions [TRAINING] Teen Challenge	02/25/2020	VI-SPDAT-V2: 3
VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions [TRAINING] LifeMoves	04/30/2017	VI-SPDAT-V2: 12
VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions [TRAINING] Teen Challenge	02/02/2016	VI-SPDAT-V2: 4

Coordinated Assessment Workflow

3) Configure the Household:

- From the Head of Household's profile, select **MANAGE** on the right side of the screen.
- Next, choose a family member to add to the household.

This screenshot shows the client profile page for 'Zebra Cake'. The top navigation bar includes 'PROFILE', 'HISTORY', 'PROGRAMS', 'SERVICES', 'ASSESSMENTS', 'NOTES', and 'FILES'. The main content area is titled 'CLIENT PROFILE'. On the right side, there is a 'Household Members' section with a 'Manage' button highlighted by a red box. The user interface also shows a user profile for 'Janel Fletcher, [TRAINING] System' and a search bar.

This screenshot shows the 'HOUSEHOLD MANAGEMENT' page. It features a search bar with the text 'Search for a Household Member' and a 'SEARCH' button. Below the search bar, there is a prompt: 'Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.' On the right side, there is a 'Household Members' section with the text 'No active members'. Below this, there is a section titled 'Your recent client searches accessed:' with a table listing recent searches. The first entry is 'Baby Zebra Cake' with the ID '8974' and a '+' button highlighted by a red box.

Client Name	ID	Action
Baby Zebra Cake	8974	+

Coordinated Assessment Workflow

3) Configure the Household (cont.)

- Select the Member type of the family member.
- Next, update the member type for the Head of Household

ADD TO HOUSEHOLD

Member Type **1**

Start Date

- ✓ Not Set
- Husband
- Wife
- Daughter
- Son
- Father
- Mother
- Sister
- Brother
- Roommate

Household Members **2**

Zebra Cake	Not Set *	
Baby Zebra Cake	Son	

Coordinated Assessment Workflow

4) Enroll in Program:

Agency's Coordinated Entry
Program:

[CE] Agency Name

OR

Emergency Shelter/Street
Outreach/Safe Parking/Services
Only or UPLIFT program.

The screenshot displays the Pound Cake system interface. At the top, the user is logged in as 'Pound Cake'. A navigation bar includes links for PROFILE HISTORY, PROGRAMS (highlighted with a red box), SERVICES, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The main content area is divided into two sections: PROGRAM HISTORY and PROGRAMS: AVAILABLE.

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Sunshine Outreach Center [TRAINING] The Sunshine Agency	01/03/2019	Active	Individual

PROGRAMS: AVAILABLE

- Frontline Shelter
- Goodnight Family Shelter
- [CE] The Sunshine Agency

Coordinated Assessment Workflow

4) Enroll in Program (cont):

- Include group members for households with minor children
- Adult only households should be enrolled as individuals with individual assessments

[CE] The Sunshine Agency

PROGRAM DESCRIPTION:
Diversion test

Active Clients

4
CLIENTS

50 % Families
50 % Individuals

 **Funding Source**
N/A

Availability
Full Availability

Include group members:

Tommy Egan

 **DOC REQUIREMENTS**

ENROLL

Coordinated Assessment Workflow

4) Enroll in Program (cont.):

Coordinated Entry program enrollment screens are pictured below.

There are no changes to the enrollment screens for the other project types.

Enroll Program for client Iron Man Test

Project Start Date 

PRIOR LIVING SITUATION

Type of Residence 

Length of Stay in Prior Living Situation 

DISABLING CONDITIONS AND BARRIERS

Disabling Condition 

Enroll Program for client Iron Man Test

Project Start Date 

PRIOR LIVING SITUATION

Type of Residence 

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

Disabling Condition 

Coordinated Assessment Workflow

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Coordinated Assessment Workflow

5) Record the Current Living Situation Assessment:

CLS Assessments are only required for adult members of the household.

PROGRAM: COORDINATED ENTRY PROJECT

Enrollment History Provide Services **Assessments** Notes Files Chart Forms ✕ Exit

Assessments LINK FROM ASSESSMENTS

Current Living Situation START

This screenshot shows a web application interface for a 'COORDINATED ENTRY PROJECT'. A navigation menu at the top includes 'Enrollment', 'History', 'Provide Services', 'Assessments', 'Notes', 'Files', 'Chart', and 'Forms'. The 'Assessments' menu item is circled in red. Below the menu, there is a section titled 'Assessments' with a 'LINK FROM ASSESSMENTS' text on the right. A light green box highlights the 'Current Living Situation' assessment, which has a 'START' button next to it. A red arrow points from this box down to the next screenshot.

ADD PROGRAM ASSESSMENT ✕

Iron Man Test Father

ADD CURRENT LIVING SITUATION

This screenshot shows a dialog box titled 'ADD PROGRAM ASSESSMENT' with a close button (✕) in the top right corner. It contains two radio button options: 'Iron Man Test' (which is selected) and 'Father'. Below these options is a button labeled 'ADD CURRENT LIVING SITUATION', which is highlighted with a red box. A red arrow from the previous screenshot points to this dialog box.

Coordinated Assessment Workflow

5) Record the Current Living Situation Assessment (cont.):

Additional questions may appear, depending on the client's responses

Add Current Living Situation for client Strawberry Shortcake

Date of Contact 03/03/2020 

Current Living Situation Select

Location Details

Add Current Living Situation for client Strawberry Shortcake

Date of Contact 03/03/2020 

Current Living Situation Permanent housing (other than RRH) for formerly homeless persons

Is client going to have to leave their current living situation within 14 days? Yes

Has a subsequent residence been identified? Yes

Does individual or family have resources or support networks to obtain other permanent housing? Yes

Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days? Yes

Has the client moved 2 or more times in the last 60 days? Yes

Location Details

Coordinated Assessment Workflow

Things to remember about the Current Living Situation Assessment:

- Complete the first CLS Assessment the same day the client is enrolled in a Coordinated Entry project
 - The Date of Contact should be the same as the Project Start Date for the Coordinated Entry project enrollment
- Complete additional CLS Assessments each time direct contact is made with clients
 - Complete a new CLS assessment each time; do not edit previous assessments
- Complete a CLS Assessment when a Coordinated Entry Assessment is provided to the client
- Record a CLS for the following project types: Emergency Shelter – night by night method only, Street Outreach, Services Only, Coordinated Entry, Safe Parking, UPLIFT

“A contact is defined as an interaction between a worker and a client designed to engage the client. Contacts include activities such as a conversation between the worker and the client about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service”.

Coordinated Assessment Workflow

6) Record the Coordinated Entry Assessment

- Located in Project/Program-level along with the CLS Assessment.

PROGRAM: SUNSHINE COORDINATED ENTRY PROGRAM

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

Assessments

LINK FROM 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

Coordinated Assessment Workflow

6) Record the Coordinated Entry Assessment

Two new questions on the VI-SPDAT Assessment:

- Assessment Location (city)
- Assessment Type (in-person, phone)

City Cake

FILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION REFER

VI-SPDAT PRESCREEN FOR SINGLE ADULTS [V2] WITH SCC LOCAL QUESTIONS

Assessment Date	06/24/2020 
Assessment Location	Select
Assessment Type	Select
Assessment Level	Housing Needs Assessment
Primary Language	Select

A. HISTORY OF HOUSING & HOMELESSNESS

Coordinated Assessment Workflow

6) Record the Coordinated Entry Assessment

Refer the person to the Community Queue if they score 4+ (3+ for Veterans).

PROGRAM ELIGIBILITY DETERMINATION

VI-SPDAT-V2 Score Summary

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	0	RISKS	0
SOCIALIZATION & DAILY FUNCTION	3	WELLNESS	1
VI-SPDAT-V2 PRE-SCREEN TOTAL		4	

REFER DIRECTLY TO COMMUNITY QUEUE

Coordinated Entry Changes

Demo in Clarity

Coordinated Entry Changes

Recap

Recap

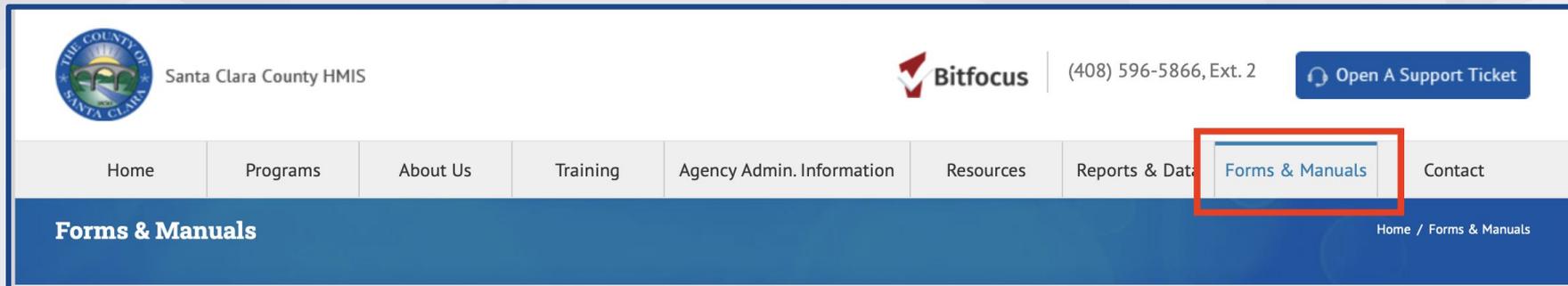
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Resources

- FY2020 HMIS Data Standards Dictionary:
<https://files.hudexchange.info/resources/documents/HMIS-Data-Dictionary.pdf>
- FY2020 HMIS Data Standards Manual:
<https://files.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual.pdf>
- SCC HMIS Website
 - [SCC.HMIS.CC](https://www.scc.hmis.cc) - All documents located under the forms and manuals section.
- Bitfocus Helpdesk
 - sccsupport@bitfocus.com
 - 408.596.5866 x2

Resources: CE Paper Forms

Please click on the image below to be redirected to the HMIS website and access these forms



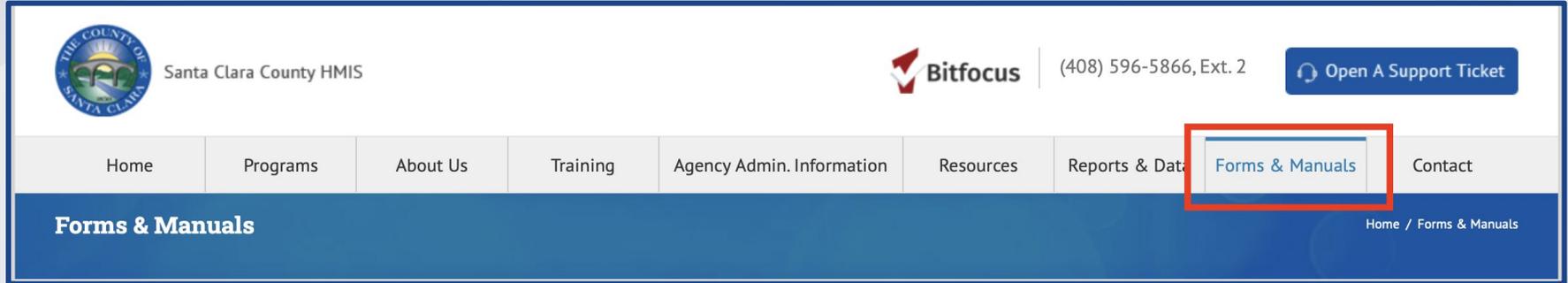
The screenshot shows the top navigation bar of the Santa Clara County HMIS website. On the left is the Santa Clara County logo and the text "Santa Clara County HMIS". On the right is the Bitfocus logo, the phone number "(408) 596-5866, Ext. 2", and a blue button labeled "Open A Support Ticket". Below this is a horizontal menu with the following items: Home, Programs, About Us, Training, Agency Admin. Information, Resources, Reports & Data, **Forms & Manuals** (highlighted with a red box), and Contact. Below the menu is a blue banner with the text "Forms & Manuals" on the left and "Home / Forms & Manuals" on the right.



The screenshot shows the content of the "Forms & Manuals" page. It is a two-column layout. The left column has the heading "(CE) Minimum Screen Forms" and a link "Intake Form (PDF,DOC)". The right column has the heading "(Updated 10March2020)" and a link "Exit Form (PDF,DOC)". The entire content area is enclosed in a red border.

Resources: CLS Paper Forms

Please click on the image below to be redirected to the HMIS website and access these forms



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Current Living Situation (CLS) Assessment

Who Should Use Current Living Situation Assessment?

(Updated 19September2019)

Coordinated Entry (CE)	Night by Night Shelter (NBN)	Services Only
Safe Parking	UPLIFT Programs	Forms (PDF,DOC)

Resources: CLS Paper Forms

Agency Name: _____



CLARITY HMIS: CURRENT LIVING SITUATION

Use block letters for text and bubble in the appropriate circles.
Please complete a separate form for each household member.

Record the date and location of each interaction with a client by recording their *Current Living Situation*. The first *Current Living Situation* with the client will occur at the same point as *Project Start Date*.

DATE OF CONTACT [Adults and Head of Household]

	-		-		
Month		Day		Year	

CURRENT LIVING SITUATION [Adults and Head of Household]

FOR PROGRAMS FUNDED SOLELY BY PATH only the following values should be selected: "Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)", "Emergency shelter, including hotel or motel paid for with emergency shelter voucher, or RHY-funded Host Home shelter", "Safe Haven", "Other", or "Worker unable to determine".

<input type="radio"/> Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)	<input type="radio"/> Rental by client, with GPD TIP housing subsidy
<input type="radio"/> Emergency shelter, including hotel or motel paid for with emergency shelter voucher, or RHY-funded Host Home shelter	<input type="radio"/> Rental by client, with VASH housing subsidy
<input type="radio"/> Safe Haven	<input type="radio"/> Rental by client, with RRH or equivalent subsidy
<input type="radio"/> Foster care home or foster care group home	<input type="radio"/> Rental by client, with HCV voucher (tenant or project based)
<input type="radio"/> Hospital or other residential non-psychiatric medical facility	<input type="radio"/> Rental by client in a public housing unit
<input type="radio"/> Jail, prison or juvenile detention facility	<input type="radio"/> Rental by client, no ongoing housing subsidy
<input type="radio"/> Long-term care facility or nursing home	<input type="radio"/> Rental by client, with other ongoing housing subsidy
<input type="radio"/> Psychiatric hospital or other psychiatric facility	<input type="radio"/> Owned by client, with ongoing housing subsidy
<input type="radio"/> Substance abuse treatment facility or detox center	<input type="radio"/> Owned by client, no ongoing housing subsidy
<input type="radio"/> Residential project or halfway house with no homeless criteria	<input type="radio"/> Other
<input type="radio"/> Hotel or motel paid for without emergency shelter voucher	<input type="radio"/> Worker unable to determine
<input type="radio"/> Transitional housing for homeless persons (including homeless youth)	<input type="radio"/> Client doesn't know
<input type="radio"/> Host Home (non-crisis)	<input type="radio"/> Client refused
<input type="radio"/> Staying or living in a friend's room, apartment or house	<input type="radio"/> Data not collected
<input type="radio"/> Staying or living in a family member's room, apartment or house	

Coordinated Entry in HMIS

