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

Clarity Human Services Training

March 2022

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Agenda

1. Coordinated Entry Basic Workflow
2. Enrollment into Coordinated Entry
3. Current Living Situation (CLS)
4. SATT and Shelter Referral
5. Accepting Referral & Shelter Enrollment
6. Reports
7. Demo
8. Q&A

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Information from

CoC Coordinator

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.

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Coordinated Entry
Shelter Provider Workflow

Shelter Provider Basic Workflow

1. Shelter provider logs into the Rural CE Program in HMIS

2. Shelter provider enters client into the Rural CE Program and completes a CLS and then a CE SATT Assessment.

3. After SATT is completed, then the shelter provider refers the client to their own program.

4. Then, the shelter provider logs in under their own agency name.

5. Finally, the shelter provider accepts the referral which enrolls the client into their shelter program.

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Enrollment into CE

Overview of CE Project Enrollment

- All CE activities should be recorded within a CE 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 switch to the Rural Nevada Coordinated Entry Agency before adding a new enrollment
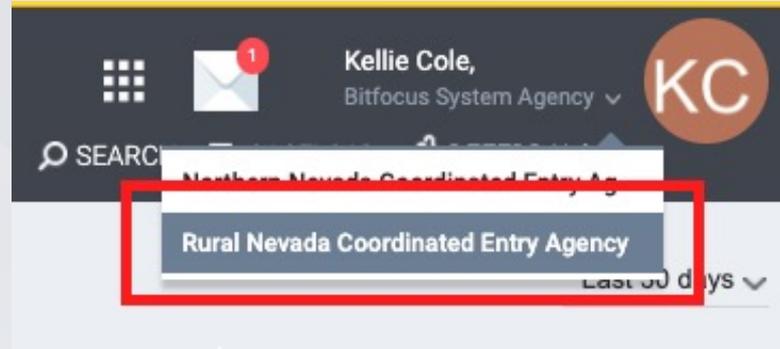
CE Project Enrollment:
ROI and Profile Creating

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.

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.

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.

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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.

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.

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

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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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SATT & Shelter Referral

SATT Assessment

SATT 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.

Remember to keep the assessment process person centered, culturally competent, private, and in a safe area.

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Referral to Shelter

- After the SATT is completed, the shelter provider can refer directly to their own shelter.

- The Community Programs or Shelters will be listed on the Eligibility Determination Screen immediately after you complete the SATT

- Click on the drop down arrow by your shelter name and then click Make Referral.

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Referral to Shelter

Kellie CE Test

PROFILE   HISTORY   SERVICES   PROGRAMS   ASSESSMENTS   FILES   NOTES   CONTACT   LOCATION   REFERRALS

PROGRAM ELIGIBILITY DETERMINATION

If appropriate, refer the client to shelter.

Community Programs

(ElkoFISH) ESG-Samaritan House Program
Elko Friends In Service Helping

EMERGENCY SHELTER

0 Beds in 1 Unit

▶ [SHP] Emergency Shelter: Individual Beds   0 Beds

🖨 PRINT DIRECTIONS   📄 DOC REQUIREMENTS   MAKE REFERRAL

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Referral to Shelter

- Once you click *Make Referral*, you will have the opportunity to add more details to the referral if desired.

- Click *Send Referral* to finish the process.

REFER TO PROGRAM

Referred Program	(ElkoFISH) ESG-Samaritan House Program
Referred to Agency	Elko Friends In Service Helping
Referring Agency	Rural Nevada Coordinated Entry Agency
Private	

SEND REFERRAL   CANCEL

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Referral to Shelter

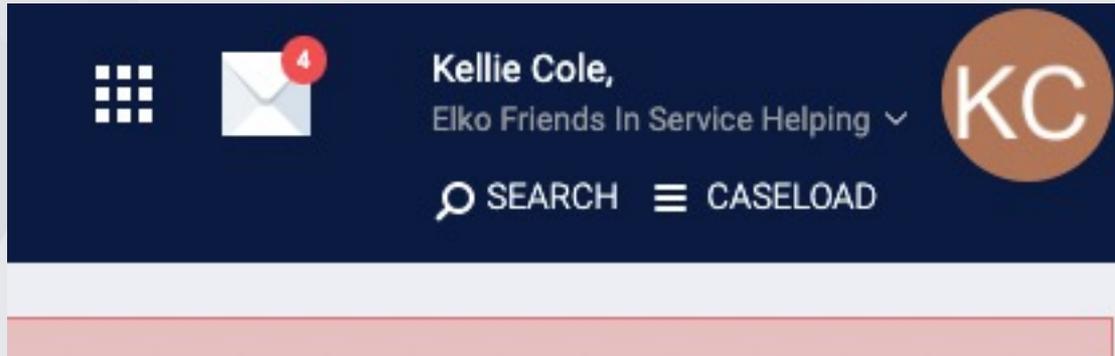- If you miss the Eligibility Determination Screen, you can always go back to the SATT assessment in the assessment tab and click *Eligibility*.

Accepting Referral & Shelter Enrollment

Switch Log-in to Shelter

- Make sure you now log into your own agency.

Accepting a Referral

- Go to the Programs tab, and then click on the drop-down arrow next to the shelter program to where you are making the referral.

Accepting a Referral

- Accepting the referral enrolls the client into the shelter and completes the referral simultaneously.

- The "program placement a result of..." toggle must be enabled.

- The orange pending referral box let's you know you're enrolling in the right program.

- Click *Enroll*

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

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Referral Statistics Report

Referral Statistics	Sarah Smith Housing Services	
	Dates Between:	
	Referral Direction:	05/01/2018 and 12/27/2018
		Outbound

Number of Agency referrals received	3
Pending Referrals	
Number of pending referrals	1
Oldest pending referral in days	83
Newest pending referral in days	83
Average pending referral in days	83
Pending - In Process Referrals	
Number of pending referrals	0
Oldest pending referral in days	0
Newest pending referral in days	0
Average pending referral in days	0
Completed Referrals	
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
Denied Referrals	
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
Breakdown Of Most Common Denied Referral Reasons	
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

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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

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Program Roster

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
Program: Youth Hope Housing											
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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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								Name Box							
9															
10															
11															
12															
13															
14															

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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, 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:
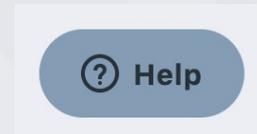
Coordinated Entry in CMIS/HMIS

Q&A

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