

Coordinated Assessment Entry Point Training

This training covers all data entry requirements for coordinated entry and is relevant to users from Maricopa and the Balance of State. It covers multiple workflows including data entry for coordinated entry and housing providers responding to referrals. The link will guide you through which videos to watch. Simply click “yes” or “no” for the questions as applicable.

Users who should complete this training:

- Any user who enters data in HMIS for a Coordinated Entry Point/Program
- Any Maricopa user who will be recording vacancies for a housing program
- Any Maricopa user who enters data in HMIS for a housing program
- Any Balance of State user who enters data in HMIS for a housing program that is funded by Arizona Complete Health

All example client names depicted herein are completely fictitious. No association with any real organization or persons is intended or should be inferred.

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Creating a Coordinated Assessment Enrollment

This section quickly reviews the initial steps in order to create a client’s Coordinated Assessment enrollment. For detailed instructions about anything covered in these 6 steps, refer to the “HMIS Introductory Training” packet.

- 1) Login to ServicePoint.
- 2) EDA into the applicable entry point. Please note some users may not complete this step if their profile is already defaulted to the applicable entry point.
- 3) Navigate to your client’s profile. This may require the creation of a new client profile.
- 4) As applicable, establish a household in ServicePoint.
- 5) Add the appropriate ROI.
- 6) Click on the “Entry / Exit” tab and create a new entry. Ensure the entry date is correct.

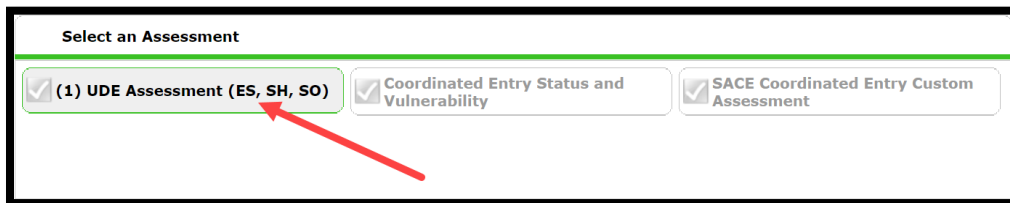
Completing Coordinated Entry Assessments

This section reviews how to complete each assessment for the Coordinated Assessment enrollment.

Completing the “(1) UDE Assessment (ES, SH, SO)” Assessment

This assessment should be completed for **all household members**, adults and minors alike.

- 1) Select the appropriate assessment. The name may vary slightly.



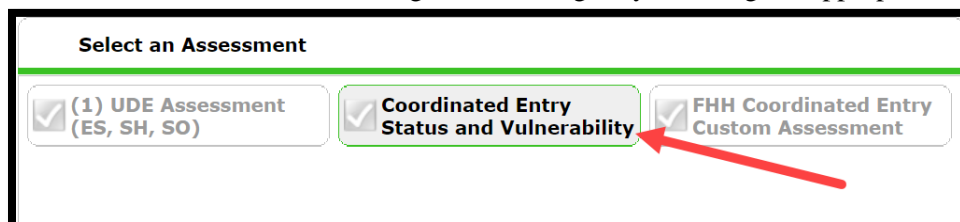
The screenshot shows a window titled "Select an Assessment" with a green header bar. Below the header, there are three assessment options, each with a checked checkbox and a red arrow pointing to it:

- (1) UDE Assessment (ES, SH, SO)
- Coordinated Entry Status and Vulnerability
- SACE Coordinated Entry Custom Assessment

- 2) Complete the “(1) UDE Assessment (ES, SH, SO)” assessment. This assessment should be completed for **all household members**, adults and minors alike. Refer to the “HMIS Introductory Training” packet for detailed instruction.

Completing “Coordinated Entry Status and Vulnerability” Assessment

This section reviews how to complete the “Coordinated Entry Status and Vulnerability” assessment. This assessment contains a series of sub-assessments to ensure proper completion of all federally required data elements. As a result, this assessment is required to be reviewed at all Coordinated Assessment enrollments. The specific requirements for each sub-assessment will be noted in each of the following sections. Begin by selecting the appropriate assessment.



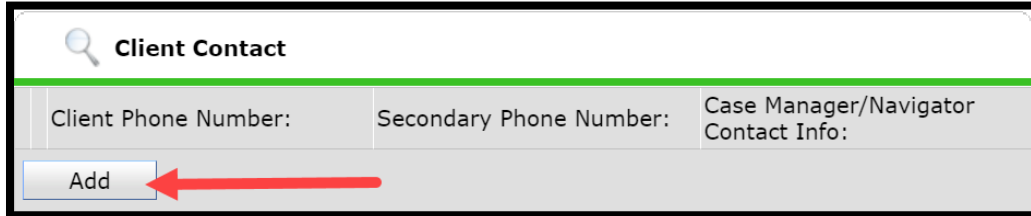
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- (1) UDE Assessment (ES, SH, SO)
- Coordinated Entry Status and Vulnerability
- FHH Coordinated Entry Custom Assessment

“Client Contact” sub-assessment

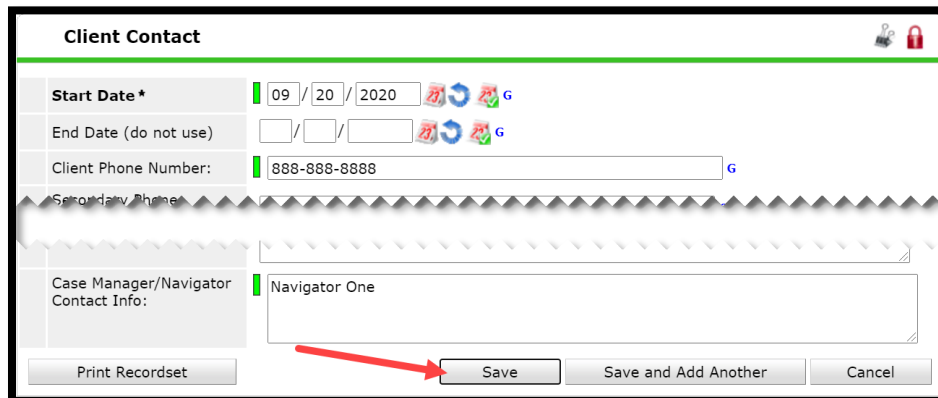
This sub-assessment is used to gather client contact information. This information will be critical in reaching out to and locating a client or family who is eligible for any shelter or housing programs. Please complete this sub-assessment for all **Head of Households and adults**.

- 1) Click on the “Add” button. A pop-up will appear on the screen.



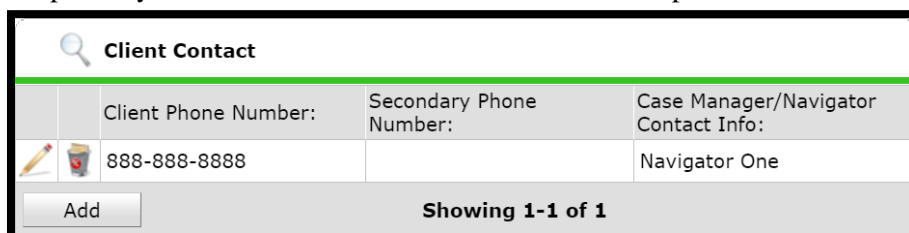
The screenshot shows the top portion of the 'Client Contact' form. It features a search icon and the title 'Client Contact'. Below the title is a table with three columns: 'Client Phone Number:', 'Secondary Phone Number:', and 'Case Manager/Navigator Contact Info:'. At the bottom left of this section is an 'Add' button, which is pointed to by a red arrow.

- 2) Complete the following fields, as applicable, on the pop-up.
 - a. **Start Date:** This date will default to the date of the assessment. Do not change this field.
 - b. **End Date (do not use):** Do not use this field.
 - c. **Client Phone Number:** Enter the client’s primary phone number.
 - d. **Secondary Phone Number:** Enter the client’s secondary phone number.
 - e. **Client Location:** Provide as much detail as possible to assist in locating a client. This can be especially important for clients who are currently on the street or another place not meant for human habitation. If a client cannot be found or contacted, they may lose shelter and housing opportunities.
 - f. **Additional Notes:** Add any notes that may be helpful in contacting the client or to provide helpful information to those reaching out to the client.
 - g. **Case Manager/Navigator Contact Info:** Use this field to record any known case manager information.
- 3) Once all applicable fields have been completed, click “Save”.



The screenshot shows the 'Client Contact' form with several fields populated. The 'Start Date' is set to 09/20/2020. The 'Client Phone Number' is 888-888-8888. The 'Case Manager/Navigator Contact Info' field contains the text 'Navigator One'. At the bottom of the form, there are four buttons: 'Print Recordset', 'Save', 'Save and Add Another', and 'Cancel'. A red arrow points to the 'Save' button.

- 4) If properly completed, you will see a new sub-assessment record, as pictured below.

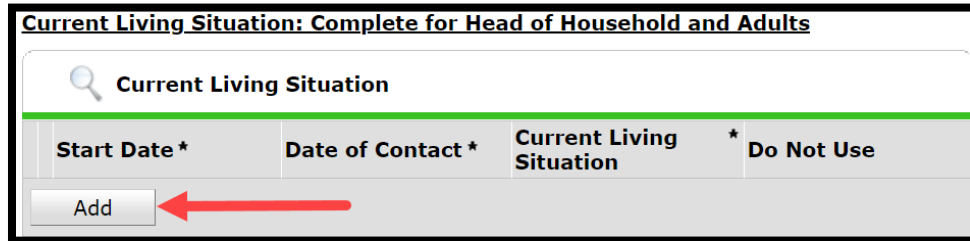


The screenshot shows the 'Client Contact' form displaying a single record. The record has a phone number of 888-888-8888 and contact information of 'Navigator One'. Below the record is an 'Add' button and the text 'Showing 1-1 of 1'.

“Current Living Situation” sub-assessment

This “Current Living Situation” sub-assessment is used to gather a client’s current living situation. This will improve the understanding of where clients are coming from and how to better serve those accessing Coordinated Assessment services. This sub-assessment is required for all **Head of Households and Adults** with an enrollment.

- 1) Click on the “Add” button. A pop-up will appear on the screen.

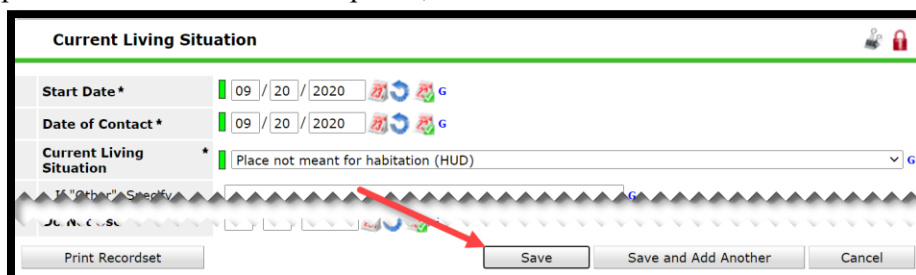


Start Date *	Date of Contact *	Current Living Situation *	Do Not Use

- 2) Complete the following fields, as applicable, on the pop-up.
 - a. **Start Date:** This date will default to the date of the assessment. Do not change this field.
 - b. **Date of Contact:** Enter the same date as the “Start Date”.
 - c. **Current Living Situation:** From the dropdown list, select where the client is currently residing.
 - **If “Other”, Specify:** If you select Other for “Current Living Situation”, provide detail
 - **Location Details:** You may enter additional information about the client’s location
 - **Living situation verified by (CE Projects Only):** This field is intended to be used in case conferencing to record contacts by outside agencies. This will not be complete for the Coordinated Assessment enrollment.

If the “Current Living Situation” falls under “Institutional Situations” or “Temporary and Permanent Housing Situations” complete the following questions. If the “Current Living Situation” is a “Homeless Situation” you will skip the rest of the sub-assessment questions.

- d. **Is client going to have to leave their current living situation within 14 days:** Select the appropriate response. If the answer is “Yes”, complete the additional questions.
 - **Has a subsequent residence been identified?:** Select the appropriate response.
 - **Does individual of family have resources or support networks to obtain other permanent housing?:** Select the appropriate response.
 - **Has the client had a lease of ownership interest in a permanent housing unit in the last 60 days?:** Select the appropriate response.
 - **Has the client moved 2 or more times in the last 60 days?:** Select the appropriate response.
 - e. **Do Not Use:** Do not enter any data in this field.
- 3) Once all applicable fields have been completed, click “Save”.



4) If properly completed, you will see a new sub-assessment record, as pictured below.

Current Living Situation: Complete for Head of Household and Adults

Current Living Situation

	Start Date *	Date of Contact *	Current Living Situation *	Do Not Use
	09/20/2020	09/20/2020	Place not meant for habitation (HUD)	

Add Showing 1-1 of 1

“Coordinated Entry Event” sub-assessment

This “Coordinated Entry Event” sub-assessment is used to record important events during a client’s movement through the Coordinated Assessment system. This will improve the understanding of where clients are coming from and how to better serve those accessing Coordinated Assessment services. This sub-assessment will only be completed **once** per entry point enrollment. This sub-assessment should be completed for the **Head of Household**.

1) Click on the “Add” button. A pop-up will appear on the screen.

Coordinated Entry Event: Complete and choose an ACCESS event only

Coordinated Entry Event

Start Date *	Date of Event *	Event *	Referral Result	Date of Result
Add				

- 2) Complete the following fields, as applicable, on the pop-up.
- Start Date:** This date will default to the date of the assessment. Do not change this field.
 - End Date:** Leave this field blank.
 - Date of Event:** Enter the same date as the “Start Date”
 - Event:** For this workflow, you will **ONLY** select **ONE** “Access Event”. Do not select a “Referral Event”. The available “Access Events” are:
 - **Referral to a Prevention Assistance Project:** Select if a client receives a referral to a homeless prevention project.
 - **Problem Solving/Diversion/Rapid Resolution intervention or service:** Select if a client received a successful diversion/rapid resolution service.
 - **Referral to a scheduled Coordinated Entry Crisis Assessment:** Select this option if the client was referred to a crisis needs service (i.e. domestic violence shelter, police, trauma hotline, etc.).
 - **Referral to a scheduled Coordinated Entry Housing Needs Assessment:** Select this option if you are completing a VI assessment, of any type, with the client.

If ‘Event’ answer was ‘Problem Solving/Diversion/Rapid Resolution intervention or service’ please answer the following question:

- Problem Solving/Diversion/Rapid Resolution intervention or service result – Client housed/re-housed in a safe alternative:** If you selected this “Access Event”, you must select “Yes”.

DO NOT complete any additional fields on this sub-assessment. Additional fields will be completed at a different stage in the client's enrollment with Coordinated Assessment.

3) Once all applicable fields have been completed, click "Save".

Coordinated Entry Event

Start Date * 09 / 20 / 2020

End Date [] / [] / []

Date of Event * 09 / 20 / 2020

Event * Problem Solving/Diversion/Rapid Resolution intervention or service

If 'Event' answer was 'Problem Solving/Diversion/Rapid Resolution intervention or service result', please answer the following question:

Problem Solving/Diversion/Rapid Resolution intervention or service result - Client housed/re-housed in a [Yes]

Date of Result [] / [] / []

Print Recordset Save Save and Add Another Cancel

4) If properly completed, you will see a new sub-assessment record, as pictured below.

Coordinated Entry Event: Complete and choose an ACCESS event only.

Coordinated Entry Event

	Start Date *	Date of Event *	Event *	Referral Result	Date of Result
	09/20/2020	09/20/2020	Problem Solving/Diversion/Rapid Resolution intervention or service		

Add Showing 1-1 of 1

“Coordinated Entry Assessment” sub-assessment

This “Coordinated Entry Assessment” sub-assessment is used to record key details about a client’s completed vulnerability assessment. Specifically, this sub-assessment should be filled out if a “Crisis Assessment” or “Housing Assessment” was selected above. This sub-assessment is required to be completed for the **Head of Household** only. **NOTE:** If the client did not receive a “Crisis Assessment” or “Housing Needs Assessment” do not complete this sub-assessment.

1) Click on the “Add” button. A pop-up will appear on the screen.

Coordinated Entry Assessment: Complete for Head of Household only.

Coordinated Entry Assessment

Date of Assessment *	Assessment Location	Assessment Type	Assessment Level	Prioritization Status	Do Not Use
No matches.					

Add

2) Complete the following fields, as applicable, on the pop-up.

- Date of Assessment:** This date will default to the date of the assessment. Do not change this field.
- Assessment Location:** Select the location where the assessment was provided.
- Assessment Type:** Select how the assessment was provided.

- d. **Assessment Level:** There are two options available for selection.
 - **Crisis Needs Assessment:** Select this option if a client will need to complete a VI assessment in the future, but did not at this interaction.
 - **Housing Needs Assessment:** Select this option if a client completed a VI assessment at this interaction.
- e. **Prioritization Status:** Always select “Placed on Prioritization List”
- f. **Do Not Use:** Do not use this field.

3) Once all applicable fields have been completed, click “Save”.

4) If properly completed, you will see a new sub-assessment record, as pictured below.

Coordinated Entry Assessment: Complete for Head of Household only

Coordinated Entry Assessment						
	Date of Assessment *	Assessment Location	Assessment Type	Assessment Level	Prioritization Status	Do Not Use
	09/20/2020	SACE - AZC - Chandler I-Help Entry Point - CE	In Person	Housing Needs Assessment	Placed on Prioritization List	

Add Showing 1-1 of 1

Completing the Appropriate VI-SPDAT sub-assessment

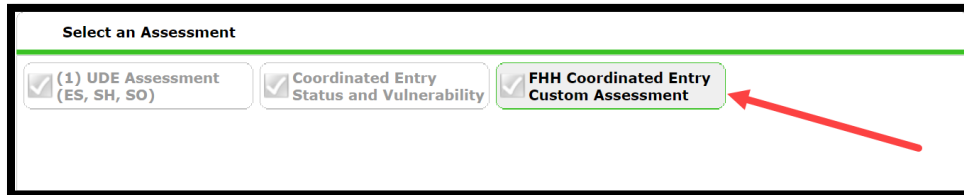
If it is determined a **Head of Household** needs to complete a vulnerability assessment, you will complete the data entry for only one of the three VI-SPDAT sub-assessments. The HMIS team does not provide training on how to properly complete the VI-SPDAT assessments. Please refer to your Coordinated Assessment lead (or Orgcode.com) for guidance. There are three types of sub-assessments you may complete.

- 1) **VI-SPDAT v2.0:** Complete this sub-assessment for adult Head of Households presenting by themselves or with only other adults.
- 2) **TAY-VI-SPDAT v1.0:** Complete this sub-assessment youth Head of Households.
- 3) **VI-FSPDAT v2.0:** Complete this sub-assessment for adult Head of Households presenting with minor children.

Completing Locally Defined Assessment

After completing the “Coordinated Entry Status and Vulnerability” assessment you have the ability to complete locally defined fields. The name of the locally defined assessment will vary, but it will be the third assessment option as pictured below. Please refer to your local coordinated assessment leads on how to complete any locally defined fields.

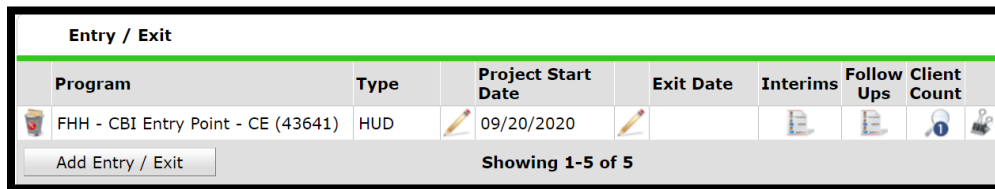
- 1) Click on the locally defined assessment.



Select an Assessment

(1) UDE Assessment (ES, SH, SO) Coordinated Entry Status and Vulnerability FHH Coordinated Entry Custom Assessment

- 2) Complete the assessment. Refer to your local coordinated assessment lead for data entry instructions.
- 3) Once the assessment has been completed for all applicable clients, click “Save & Exit”. You will now see a new Coordinated Assessment enrollment for your client.



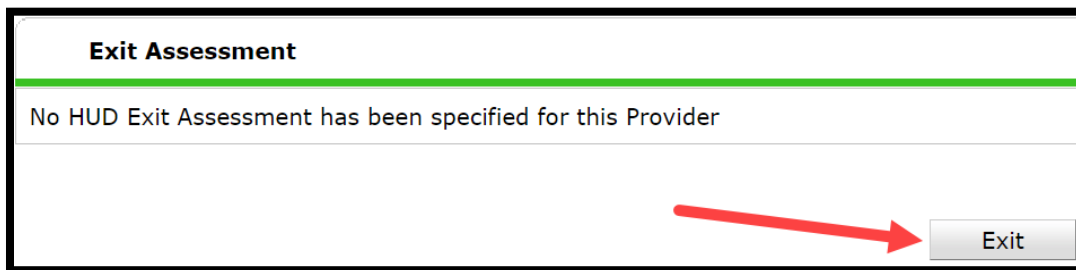
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
FHH - CBI Entry Point - CE (43641)	HUD	09/20/2020				

Add Entry / Exit Showing 1-5 of 5

Exiting Client or Household

This section reviews how to exit a client and household from the Coordinated Assessment enrollment. Often, the exit will occur on the same day as the initial enrollment. An exit from coordinated entry means the client’s locally defined assessment process has been completed. Please refer to your local coordinated entry lead for any specific instructions.

- 1) Select the pencil icon next to the “Exit Date” field.
- 2) Complete the “Reason for Leaving” and “Destination” fields. If the client is exited on the same day, and completed the VI-SPDAT, the appropriate Reason for Leaving will be “Completed Program”. The Destination will be the same as their reported Current Living Situation.
- 3) There are no additional exit questions. Click “Exit” to complete the client’s or household’s exit from the program.



Exit Assessment

No HUD Exit Assessment has been specified for this Provider

Exit