Coordinated Entry Access Points -- HMIS Workflow Overview

Purpose: This document outlines the workflows and data quality expectations Coordinated Entry Access Points in HMIS. Access Points are defined as the locations/projects that assess the needs of clients entering the homeless services system.

Creating a Coordinated Entry Enrollment

This section reviews how to create a client's Coordinated Entry 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.
    a. **Balance of State (BOS)**: For most users in the BOS continuum, use Coordinated Entry Project – CE(717). In some cases, a distinct provider may be used for SNOFO grants.
    b. **Maricopa (MAR)**: For users in Maricopa County, the proper entry point will be designated by the CE Leads (Single Adult Coordinated Entry or Family Housing Hub).

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.

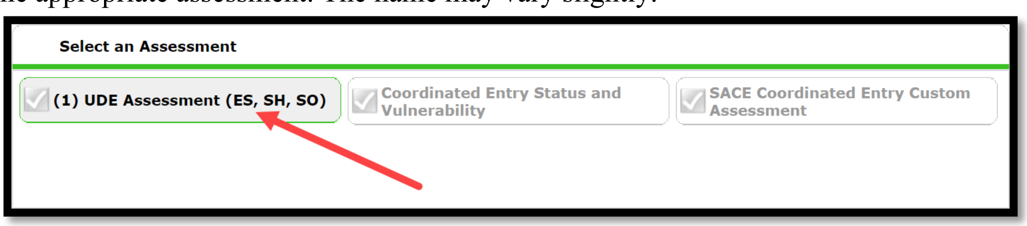
Completing Coordinated Entry Assessments

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

Completing the "(1) UDE Assessment (ES, SH, SO)" Assessment

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

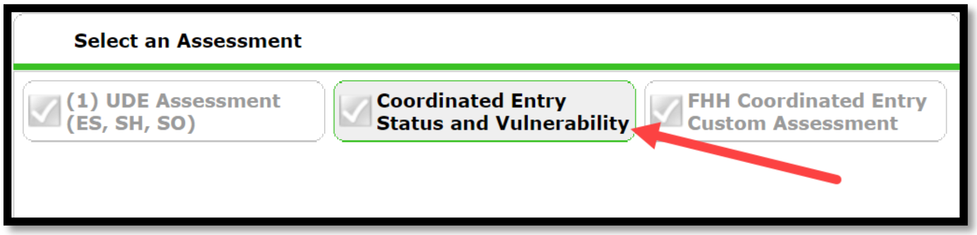
1) Select the appropriate assessment. The name may vary slightly.



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

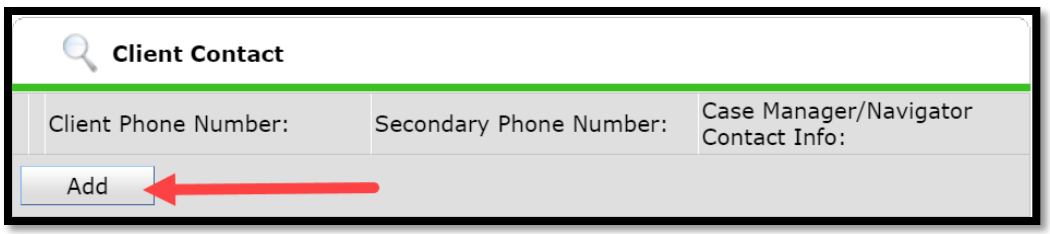
This section reviews how to complete the “(2) Coordinated Entry Status and Vulnerability” assessment. This assessment contains a series of sub-assessments and questions to ensure proper assessment and data collection. Begin by selecting the appropriate assessment.



Client Contact sub-assessment

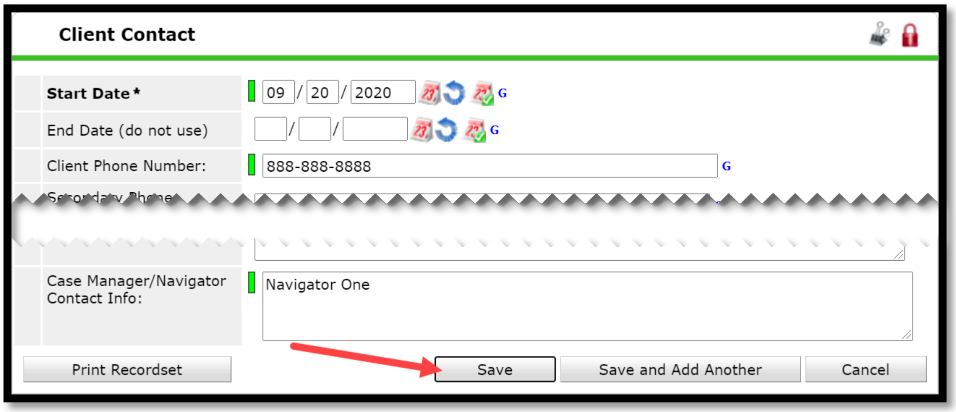
This sub-assessment is used to gather client contact information. In Maricopa County it is called the “Client Contact” sub-assessment. In Balance of State, it is called the “Coordinated Assessment Client Contact Information” sub-assessment. In both cases, the information will be critical in reaching 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.

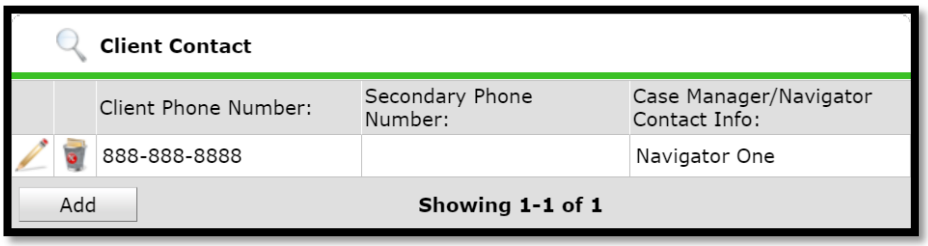


2) Complete the following fields, as applicable, on the pop-up.
   a. **Start Date**: This date will default to the date of the assessment. Do not change this field.
   b. **Client Phone Number**: Enter the client’s primary phone number.
   c. **Secondary Phone Number**: Enter the client’s secondary phone number.
   d. **Client Location (MAR)/Cross Street Address (BOS)**: 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.
   e. **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.
   f. **Case Manager/Navigator Contact Info (MAR Only)**: Use this field to record any known case manager information.
   g. **End Date (do not use)**: Do not use this field.

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



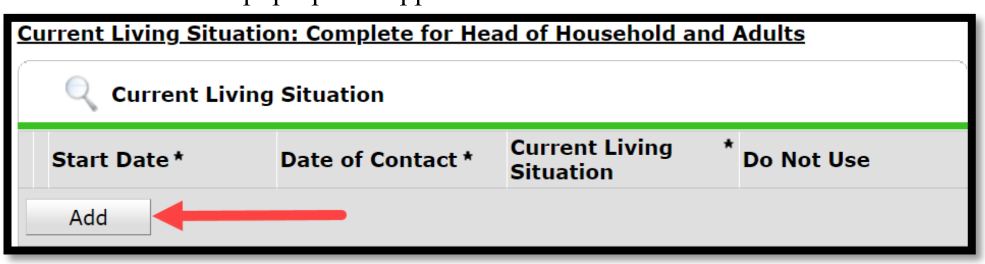
4) If properly completed, you will see a new sub-assessment record, as pictured below.



"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 seeking services. This sub-assessment is required for all **Head of Households and Adults** within an enrollment.

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



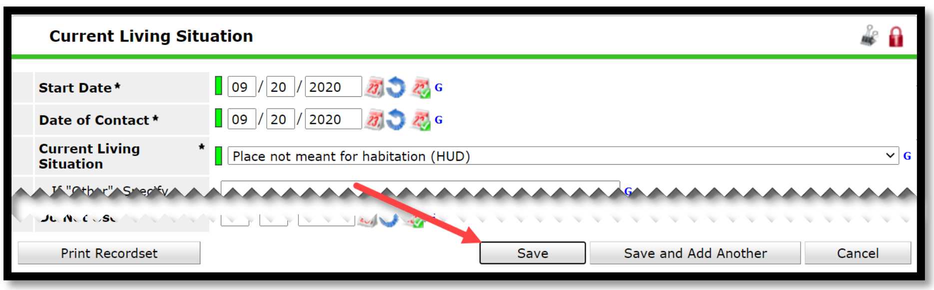
2) Complete the following fields, as applicable, on the pop-up.
   a. **Start Date**: This date will default to the date of the assessment. Do not change this field.
   b. **Date of Contact**: Enter the same date as the "Start Date".
   c. **Current Living Situation**: From the dropdown list, select 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 completed for the Coordinated Entry 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”.



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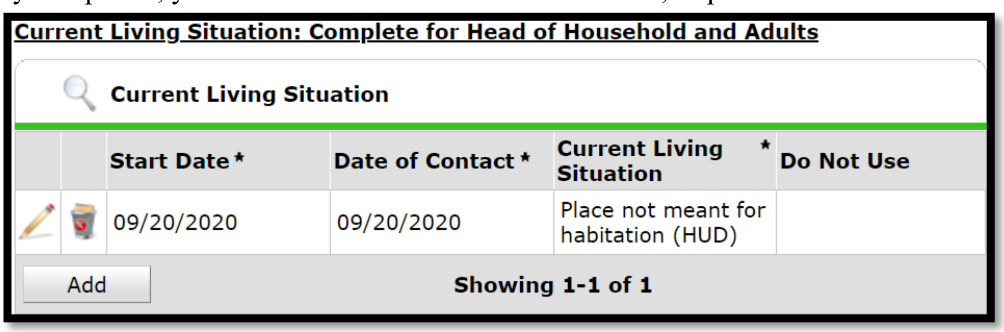
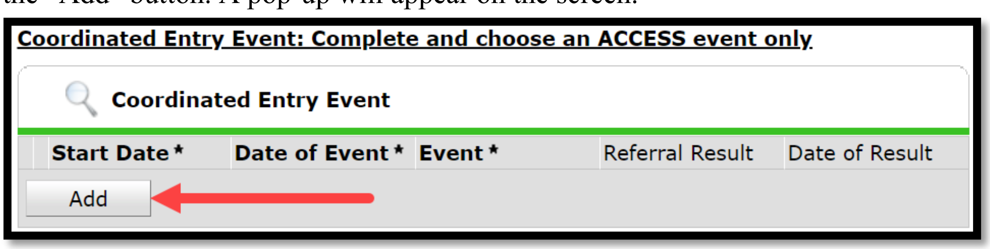


“Coordinated Entry Event” sub-assessment

The “Coordinated Entry Event” sub-assessment is used to record important events during the Coordinated Entry process. This helps improve the understanding of where clients are coming from and how to better serve those accessing Coordinated Entry 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.



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 Event**: Enter the same date as the "Start Date"

   c. **Event**: For this workflow, you will **ONLY** select **ONE** "Access Event". Do not select a "Referral Event". The available "Access Events" are:

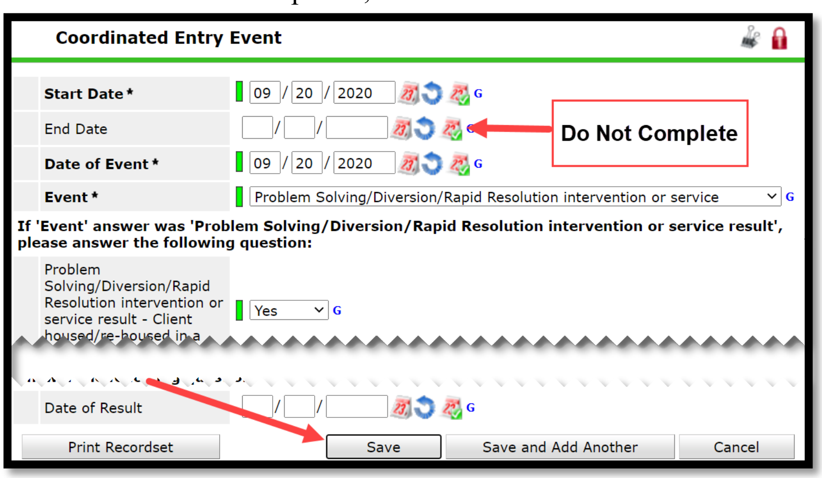
      - **Referral to a Prevention Assistance Project**: Select if a client receives a referral to a homeless prevention project.
      - **Problem Solving/Diversion/Rapid Resolution intervention or service**: Select if a client received a successful diversion/rapid resolution service.
      - **Referral to 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:

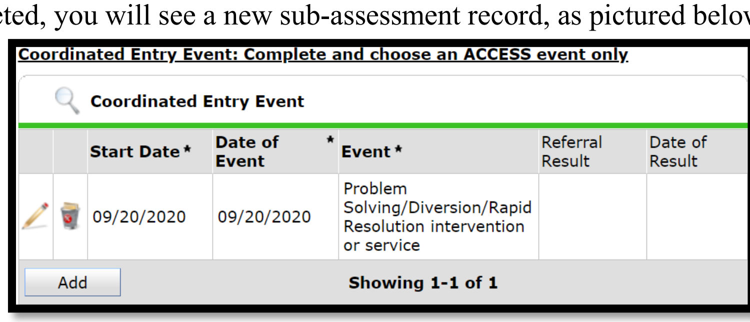
   d. **Problem Solving/Diversion/Rapid Resolution intervention or service result – Client housed/re-housed in a safe alternative**: If you selected this "Access Event", you must select "Yes".

   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".



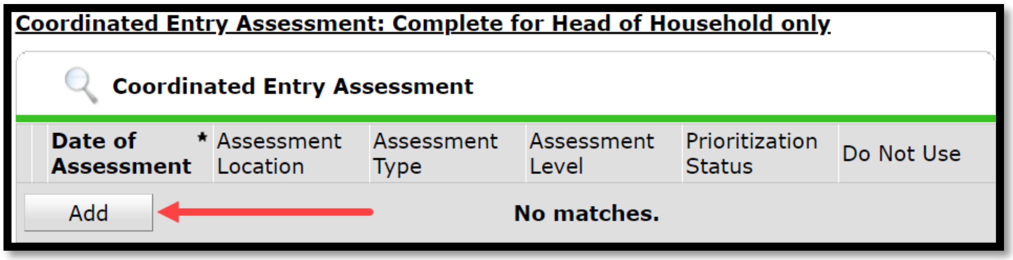
4) If properly completed, you will see a new sub-assessment record, as pictured below.



“Coordinated Entry Assessment” sub-assessment

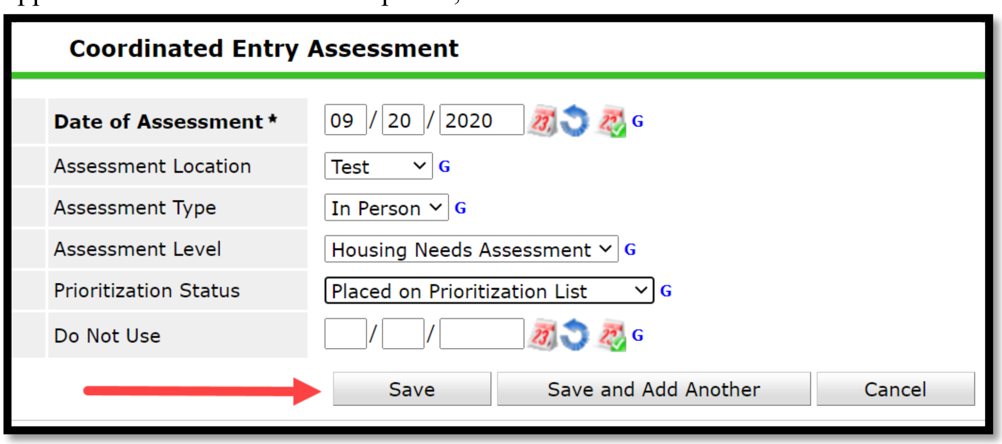
This “Coordinated Entry Assessment” sub-assessment is used to record key details about a client’s completed vulnerability assessment. Specifically, this sub-assessment should be filled out if a “Crisis Assessment” or “Housing Assessment” was selected above. This sub-assessment is required to be completed 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.



2) Complete the following fields, as applicable, on the pop-up.
   a. **Date of Assessment**: This date will default to the date of the assessment. Do not change this field.
   b. **Assessment Location**: Select the location where the assessment was provided.
   c. **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. **Ignore: Do Not Use**: Do not use this field.

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



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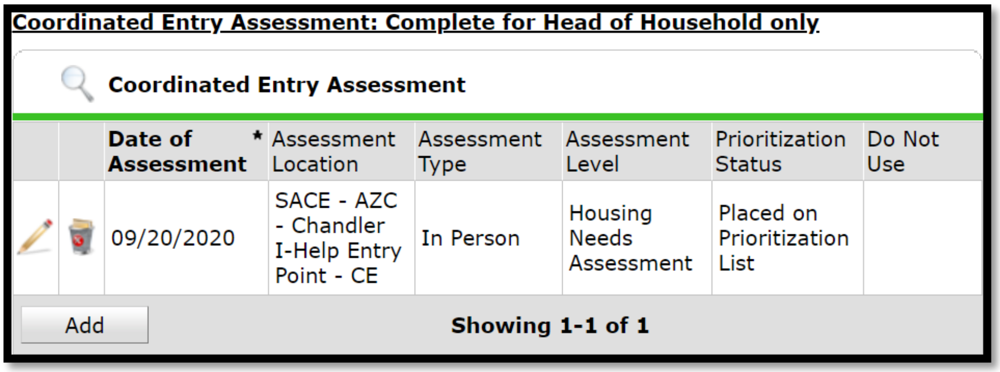

Coordinated Entry Assessment: Complete for Head of Household only

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	

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Completing the Locally Defined Assessment(s)

If a client is not diverted from homeless services, and they have not recently been assessed, then additional assessment tools and/or questions will be used. Not every continuum or CE system uses the same tools. Below are different examples of tools used. The **Head of Household** should complete the most appropriate assessment, based on local guidelines. The HMIS team does not provide training on how to administer these assessments. Users should refer to their CE Leads for proper training.

1) **VI-SPDAT v2.0**: Complete this sub-assessment for adult Head of Households presenting by themselves or with only other adults. This is used primarily by the Balance of State Continuum of Care.

2) **TAY-VI-SPDAT v1.0**: Complete this sub-assessment for youth Head of Households. This is used primarily by the Balance of State Continuum of Care.

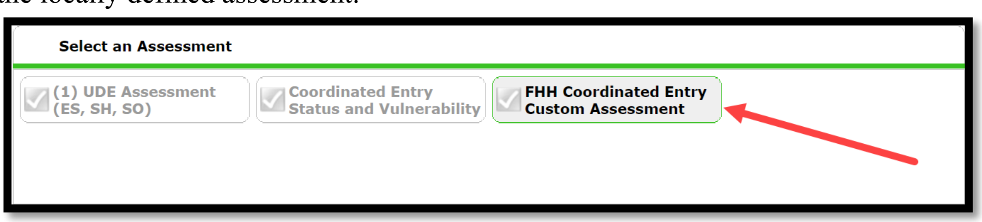
3) **VI-FSPDAT v2.0**: Complete this sub-assessment for adult Head of Households presenting with minor children. This is used primarily by the Balance of State Continuum of Care and the Family Housing Hub in Maricopa County.

4) **MAP Tool**: This refers to 4 supplemental questions, to be completed in Maricopa County for providers working with the Single Adult Coordinated Entry (SACE) system.

Completing Locally Defined Assessment

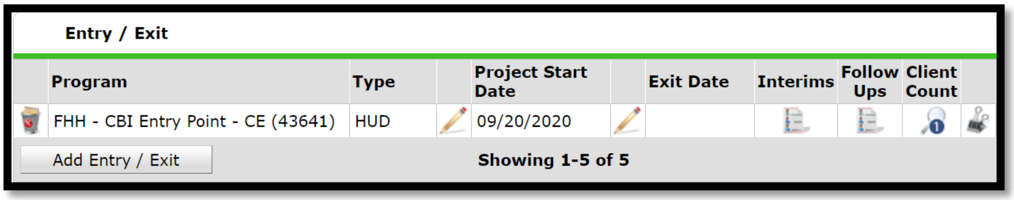
After completing the "(2) Coordinated Entry Status and Vulnerability" assessment you have the ability to complete locally defined fields. The name of the locally defined assessment will vary, but it will be in addition to the two prior assessments (as pictured below). Please refer to your local coordinated assessment leads on how to complete any locally defined fields.

1) Click on the locally defined assessment.



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.



Exiting Client or Household

This section reviews how to exit a client and household from the Coordinated Assessment enrollment. The exit will occur on the same day as the initial enrollment. For any exceptions, refer to the local Coordinated Entry Lead. 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 follow-up or next steps.

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.

Screening Outcome	**Reason for Leaving**	**Destination**
Assessed	Completed program	The actual place they reported they were going to stay tonight.
Diverted	Diverted from homeless services	The actual place they reported they were going to stay tonight.
Left before completing screening	Unknown/ Disappeared	The actual place they reported they were going to stay tonight. If unknown, then "No exit interview completed (HUD)"
Staff discovers they are not eligible, after screening convo has already started	Needs could not be met	The actual place they reported they were going to stay tonight.

3) There are no additional exit questions. Click “Exit” to complete the client’s or household’s exit from the program.