Coordinated Entry Assessment Guideline

Every assessor within the Heartland Continuum of Care, regardless of what organization they are from, should be sharing and explaining the correct information when discussing the Coordinated Entry System with our population.

Introducing the Coordinated Entry Assessment:

1. **Introduction**
    a. Introduce yourself, job title, agency affiliation, etc.
    b. Explain and provide the purpose of the Coordinated Entry Assessment
        i. Some examples of information to include with a participant
            1. "This assessment and the information that is being collected is a way for us to capture your current living situation, and better understand your history of homelessness, your health, and housing needs.
            2. "This is not an immediate solution to your current situation, but it is a first step."
            3. "There is no exact timeline of when you will be housed, as it depends on the availability of units from agencies."
            4. "It is important you share accurate information with me, as there are no right or wrong answers."
2. Eligibility criteria
    a. Ensure that the person on whom you are completing the assessment meets one of these categories:
        i. **Literally Homeless**: staying in an emergency shelter, transitional housing, a place not meant for human habitation, or a hotel paid for by an organization.
        ii. **Imminent risk of homelessness**: Has to leave residence in 14 days
        iii. Fleeing/Attempting to Flee Domestic Violence
3. Obtain consent that they are okay with sharing this information in software that we use.
        i. Update the ROI tab if needed
            1. "I want to make sure it is okay to include any information you provide to me in our system. Other agencies have access to this information."
4. Before you begin the assessment, check you are in "**Enter Data As**" as "**Coordinated Entry**"

These are step-by-step instructions on how to complete a Coordinated Entry Assessment in HMIS. This guide also suggests ways to ask questions to ensure accurate answers that reflect a person's overall experience within the homeless response system.

How to enter Coordinated Entry in HMIS:

1. Go to "**Enter Data as**" in the top right corner and select the "**Coordinated Entry**" option.
2. Search for the client.
    a. If in the system, go to their profile.
    b. If **not** in the system, add them by:
        i. Putting in all of their demographics -- Name, DOB, SS #, vet status, etc.
        ii. After all demographics have been added, click "**Add New Client with This Information".**
            1. Click "**OK**" on the "**You are about to add a new client to the system… Continue with Add New Client?"**

3. Once in the client's profile – go to the "**Summary**" tab
    a. Find "**Coordinated Entry Contact Information**"
        i. Click "**Add**" and include as much information in this section as you can.
            1. Helps housing providers locate clients more easily when a housing opportunity is available.
    b. Find "**Emergency or Alternate Contact Information**"
        i. Click "**Add**" and include the client's emergency contact

4. Go to the "**Client Profile**" tab. Under this tab in HMIS, please complete each section as much as possible.
    a. **"Client Record Section"**
        i. Ensure the entire section is complete
    b. **"Client Demographics Section"**
        i. Ensure the entire section is complete
    c. **"Needs Assessment Section"**
        i. "**Case Notes for Outreach**" This section is for clients "on the streets" only.
            1. Outreach staff should utilize this section to provide updates on clients.
        ii. <u>When to add someone to the outreach by-names list?</u>
            1. If you are consistently working with them
            2. If you are attempting to engage
            3. If you notice there is either a substance use disorder or mental health disorder
                a. Use the dropdown and change it too "**Yes**"
                b. If unable to locate client after outreach attempts
            4. If they are not readily accessing shelter
    d. "**Client Phone Numbers**" section (if you forgot to put the number in Coordinated Entry Contact Information)
        i. Both sections will pull the numbers over.
    e. **"Crisis Needs, General Needs, and Housing Needs assessments"**
        i. Please fill out as much information you can with the client, this helps case managers/outreach staff when working with a client
        ii. <u>You must ask the client the question:</u>

            1. **How many bedrooms does the client really need?**
    f. **Optional Housing Needs section**
        i. Ask the client each question in this section how it is worded in HMIS, "Is this client interested in options pertaining to LGBTQ+" asking if they are interested in opportunities
            1. There are specific housing options for these three parties when they are available, we are looking for those folks who have expressed interest.
                a. **"**Our community has the Phoenix Center which specializes in LGBTQ+ housing and services, are you interested in LGBTQ+ services?"
                b. "We have additional housing opportunities that include treatment and support for people who are HIV positive, are you interested in these services?"
                c. "Fifth Street Renaissance has different programs that we can connect you to for housing options."

5. "**Household Tab"**
    a. If a new client, click **"Start New household"**
        i. Select the appropriate option for client/family for **"Household Type"**
            1. If a family:
                a. Look up members in HMIS
                    i. If not in HMIS, create profiles and add them to the household.
        ii. Click "**Continue**".
        iii. Complete **"Household Members"**
            1. The system needs to know who the head of household is, and ensure that this section is completed.
    b. If not a new client/no new members need to be added their household should be already in HMIS.
        i. Just make sure it accurately reflects their situation.
6. **ROI Tab**
    a. Ensure you obtain consent
        i. Essentially this captures that the client is allowing or not allowing this information to be put in the system and shared with other agencies.
    b. Change the date to reflect two years from the current date.
    c. Update documentation dropdown.
7. **Entry/ Exit Tab**
    a. **If you do not have an entry for Coordinated Entry, this person will not get pulled onto the coordinated entry referrals list.**
        i. Click "**Add Entry/Exit**"
            1. Include all household members if applicable.
            2. Type "HUD"
        ii. Complete the entire entry
            1. Complete the entire **Disability HUD Verification section (check mark must turn green for it to be complete)**
                a. "Has a doctor ever diagnosed you with a disability before?"
                b. If there is an **update** on this section, either a client has a new disability or no longer has one, you must edit that.

i. Click the pencil icon on the corresponding disability.
ii. Put an end date on the corresponding disability.
iii. Then click the "**Add**" button if a new disability needs to be included.

2. **"Prior Living Situation"**
   a. Where did the client stay the night before the client entered into this program?
3. **"Length of Stay in the previous place"**
   a. How long have they been staying in their prior living situation?
4. **Approximate date <u>THIS</u> episode of homelessness started**
   a. Start date to their "Prior Living Situation"
5. **"Regardless of where they stayed last night - Number of times the client has been on the streets, in ES, or SH in the past three years including today"**
   a. How many different times have they experienced homelessness within the **last three years**?
      i. Went to shelter→ <u>one time</u> → went to the street → <u>two times</u> → went to live with family →still two times → went back to shelter → <u>three times</u>
6. **"Total number of times months homeless on the street, in ES or SH in the past three years"**
   a. You can refer back to the "approximate date this episode of homelessness started" section to help fill out this answer.
7. **"Domestic Violence"**
   a. If you mark yes, fill out the additional questions.
   b. If they are currently fleeing, you will need to mark them as being in an "**Unsafe Situation**" in the assessment section **and** complete the **DV Prioritization Indicator.**
8. **"Current Living Situation"**
   a. Include where they are currently staying and mark the start date as the day you are completing this assessment.
   b. If the client answers yes to "Is the client going to have to leave their current living situation within 14 days?"
      i. There is a possibility that this client could be connected with diversion funds or rental/utility assistance depending on their current living situation.
9. **"Date of engagement"**
   a. More for outreach purposes, include a date of engagement, when they are willing to engage in completing the CE process, capturing this date states they want to get assessed for housing.
      i. It might take a couple of visits with a client before they are ready.
      ii. If they are staying in the shelter, the date of engagement is not necessary.

iii. **"Coordinated Entry Assessment"**
   1. Optional to complete

iv. **"Coordinated Entry Event"**

            1. Optional to complete
    b. Assessors are only completing the **Entry** piece, the **Exit** piece is completed by our HMIS administrator.
    c. Once entry is complete, click "**Save and Exit**" then proceed to the "**Assessment**" tab.

8. **"Place Value Housing Scoring Model Section"**
    a. Helps our community determine the most vulnerable individuals/families
        i. **"Select an Assessment"**
            1. Should default to **Place Value Housing Scoring Model** <u>(DO NOT CHANGE THIS)</u>
                a. If it does not you are not in Enter Data as "Coordinated Entry"
        ii. Complete "agency" and "date"
        iii. **"Household Type"**
            1. Choose between the options in the dropdown
        iv. **"Living Situation"**
            1. Choose the options in the dropdown
                a. **Imminent risk of Homelessness:** those that are couch surfing, in an apartment facing eviction, in a hotel **but** paying for it themselves.
                b. **Potentially literally homeless/multi-system engagement:** those that are in a hospital, a facility, in jail, if they were homeless before they placed
                c. **Literally homeless:** those that are staying in emergency shelters, in places not meant for human habitation, a hotel that is paid for by an agency
                d. **Very Likely Chronically Homeless:** those who are literally homeless, have an allowable disability by HUD, and have been experiencing homelessness for over a year whether it is continuous or on 4 separate occasions within the last three years
                e. **Unsafe Situation:** If you have marked that they are fleeing DV, and have scored more than a 14 on the DV indicator.
        v. **"Domestic Violence Prioritization Indicator"**
            1. Complete assessment fully
                a. Safety section
                    i. Mark one or the other
                b. Primary Type of Abuse
                    i. Score based on primary type
                c. Total up the numbers
        vi. **"Focus on the past three years narrative section:"**
            1. This section is focusing on <u>**JUST**</u> the last 3 years.
            2. Break it down by year, 2021, 2022, etc.
            3. Document breaks in homelessness, share what shelters stay they have, share if they have been homeless in another agency,
                a. Do not put a case note in here, do not put disabilities, risks/barriers, etc.
                    i. We are looking for their homeless experience, which will ultimately help the housing providers when determining chronicity.

vii. **"Length of Time Homeless:"**

1. **Choose the option in the dropdown:** Make sure it reflects what is in the entry already and what is reflected in the narrative or other entries (shelter stays, outreach)
    a. Homeless for less than 12 months:
    b. Homeless 12+ months over the past three years WITH breaks in homelessness and HUD-recognized disabling condition
    c. Homeless 12+ CONSECUTIVE months with NO breaks and a HUD-recognized disabling condition

viii. **"Risks and Barriers"**

1. Enter in either a "0" or "1"
    a. It is best to read through these at least one time before completing a CE assessment so you can understand what the question is asking.
2. Total up their score based on their answers

ix. **"Total Score for the entire assessment"**

1. Pull the first number from each section and that will total your score

x. **"Short-Term ONLY Rapid Re-housing"**

1. Reserved for employees of Helping Hands

9. **Once the assessment is completed:**
    a. Provide the client with the next steps depending on your work with the client
        i. A common question "How long will I be on the list?"
            1. Reiterate to them what you said in the beginning, it is not a quick turnaround, it depends on unit availability with agencies.
            2. Share that our community prioritizes those that have the longest length of time homeless and with the most risks and barriers.
            3. Share the Housing Helpline number with them if they have questions in the future, need to update any information that is stored in HMIS or need connections to further resources later on.

10. It could be beneficial to open a dialogue about the individual or family's current stage in the process of securing housing. Some areas of housing are a faster avenue than if they are only on the coordinated entry list.
    a. "Have you applied at the Springfield Housing Authority for Public Housing or Section 8 housing? If you have, where are you on the waitlist?"
    b. "Have you applied at Capitol Plaza or any other apartment complexes?"

To update the coordinated entry assessment for an individual or family.

1. Go to "**Enter Data as**" in the top right corner and select the "**Coordinated Entry**" option.
2. Go to the **ORIGINAL** unedited CE entry and do an "**Interim**" update
    a. Find the CE entry and click the "**Interims**" folder, which is located to the far right of the entry/exit area.
    b. Click **"Add Interim Review"**
    c. Locate "**Interim Review Type**" and select the "**Update**" option on the dropdown.
    d. Click "**Save and continue"** and proceed to update all of the items that need to be adjusted, such as **length of time homeless**, **how many months they have been homeless, prior living situation**, etc.
    e. Once updated click **"Save and Exit**"
3. Go to the "**Assessment**" tab and update any information as needed.
    a. Update/review the "**length of time homeless**" or "**living situation**" based on the new information in their entry.
    b. Update/review the "**narrative section"** and "**risks and barriers"**.
    c. **Total up new score** and save.
4. If any data needs updated in the "**Needs Assessment**" section, you are able to do that under the "**Assessment**" tab or under the "**Client Profile**" tab.
    a. This is not a required element for updating the Coordinated Entry or score.