SANTA MARIA/SANTA BARBARA COUNTY

Homeless Management Information System

September 2023

Coordinated Entry HMIS Workflow Manual

Community Technology Alliance
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Santa Barbara HMIS Web Portal

Link to the portal: https://ctagroup.org/santa-barbara-hmis/

The Web portal provides you with the following online resources:

- **HMIS Log in**: click to access your HMIS site.
- **User Central**: repository of workflow manuals, Intake forms and other HMIS-related documents.
- **Training**: Provides details on upcoming trainings. Includes an on-line reservation system for users to sign up for upcoming trainings.
- **Partner Agencies**: Provides details on HMIS participating agencies.
- **Help**: CTA's Help Desk (built in Salesforce). HMIS users can quickly file a ticket detailing their needs. The system then notifies the HMIS Administrator via email of a new ticket.

Coordinated Entry System (CES) Overview

The Santa Maria/ Santa Barbara Coordinated Entry Housing Needs Assessment is administered at multiple CES Access points. Assessment data is entered into The Homeless Management Information System (HMIS) in a shared CES project accessible to all CES participating agencies.

This manual is designed for users that are familiar and comfortable using HMIS. While we will highlight some key parts of data entry process, if you need a more in depth review please visit User Central and read the HMIS Workflow Manual or attend HMIS New User Training.

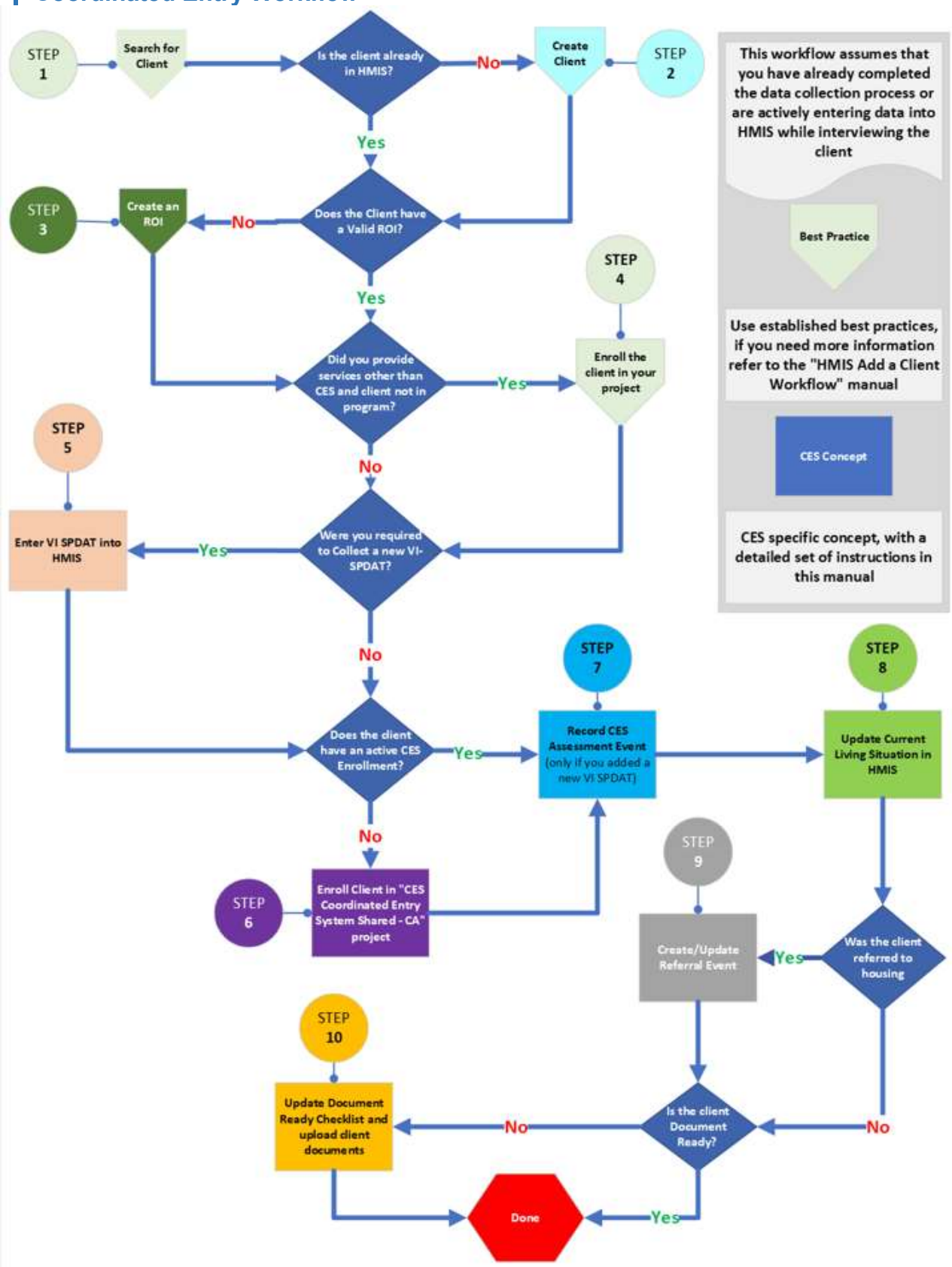
At minimum all clients with a VI-SPDAT are enrolled in the Shared CES Project in HMIS, If the client receives services from one of the projects at the entry point as part of their visit, An enrollment for that project must also be entered into HMIS

Data is collected at multiple times while the client is participating in CES. Data is collected when:

- The client goes to an access point and is assessed.
    - VI-SPDAT, HMIS Standard Intake, Release of Information
- There is a change the in the client's Current Living Situation
- The client moves into housing
- The client exits CES

The CES Assessment is only used as part of the CoC's CES system to capture information and efforts made to house the client and for planning purposes.

Coordinated Entry Workflow

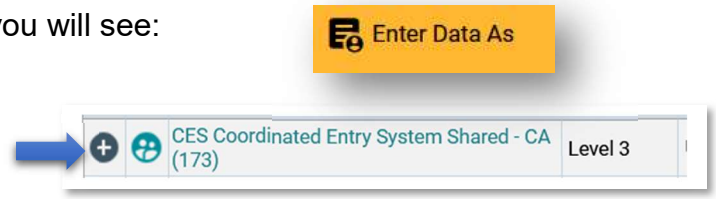


Best Practice Reminders

You must use **"Enter Data As" (EDA)** Mode and select the provider for which you will be entering data. In this case, if you provided the client with services from your project, you would select that project. If you did not provide any other services you would select the Shared CES Project. You will see Enter Data As in **red** throughout this manual If you are already in EDA mode as the desired project you can ignore that step

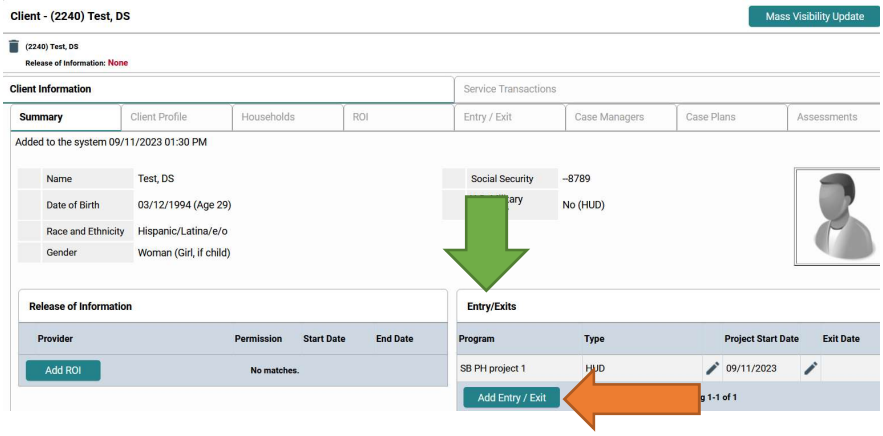
How to "Enter Data As"?

- At the top right of the screen you will see:
- Click on "Enter Data As"
- Click on the ⊕ next to the project you wish to enter data as (blue arrow)

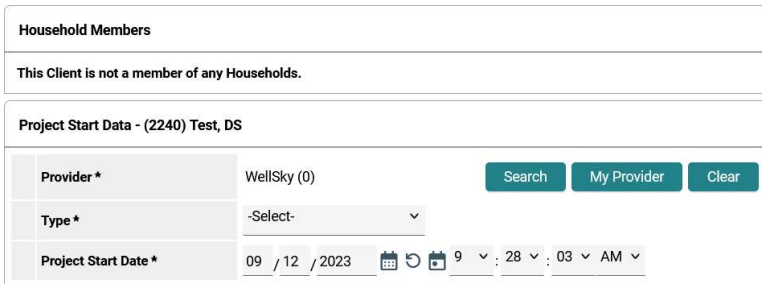


<u>To enroll the client in your project</u>:

- "Enter Data As" the project for which you want create an enrollment
- Search and select a client
- If client appears in search, click on client's name to access their Summary page
  - Locate the **Entry/Exits** box (green arrow)
  - Click Add **Entry/Exit** (orange arrow)



- **Type**: select HUD
- **Project Start Date:** defaults to today's date. Change if necessary
- Click **Save & Continue**

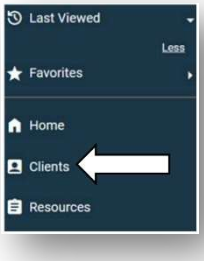


- Complete the assessment displayed
  - If the client has been enrolled by another agency, the data fields in the assessment will have data in them. Review and update as needed.
- Click **Save & Exit**. Client is now enrolled in your project.

STEP 1 – Search for Client

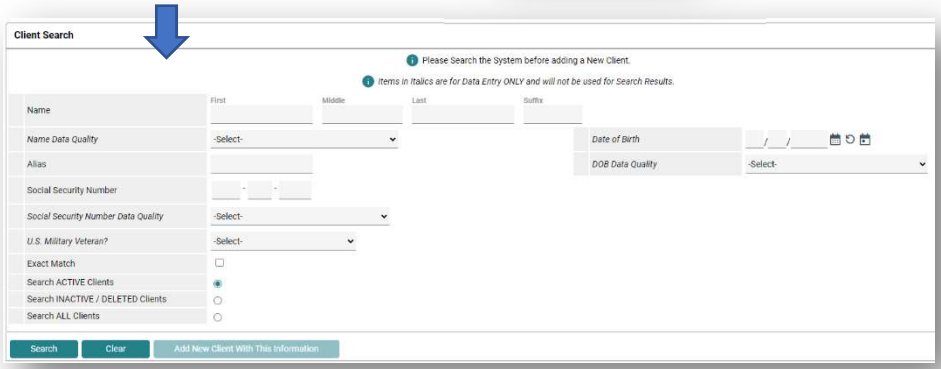
On the left side of your screen locate Clients (white arrow)

- Click Clients.
- Client Search page displays



Name: enter the first two letters of client's First Name, and full last name in Last (blue arrow)

Optional: You can also enter their Social Security Number and/or Date of Birth

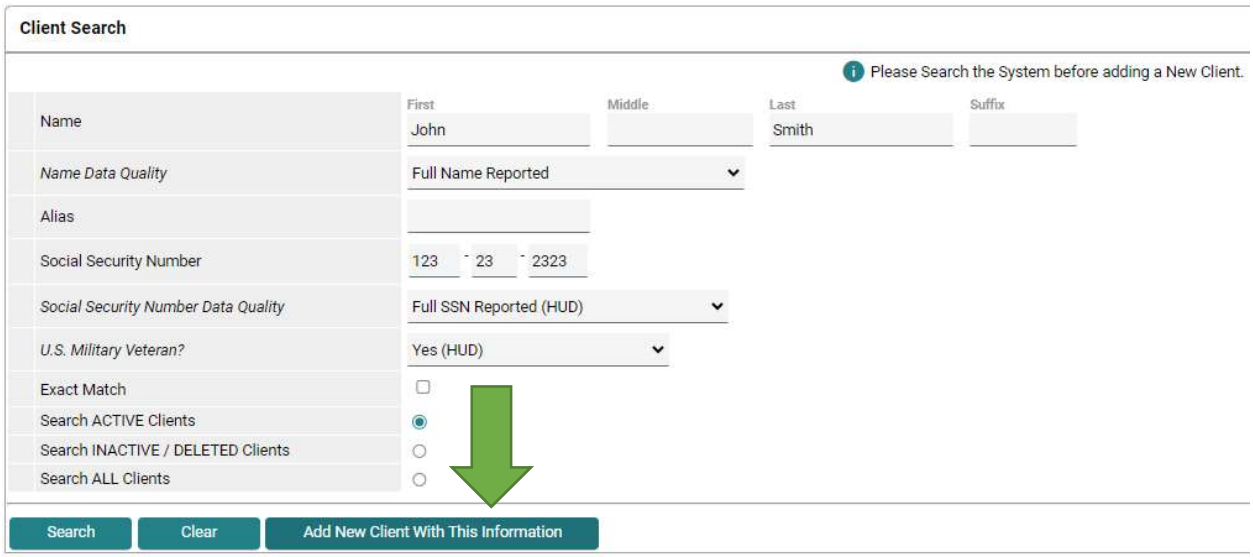


If client is in HMIS, possible matches will display.
In this example, one possible match displays. Several possible matches may appear.

If client is a possible match, click on the pencil (orange arrow) to access their HMIS file.

STEP 2 – Create Client

If after searching for the client there are no results, or none of the results match your client you will need to create the client in HMIS. Continuing on from the Search page, enter all of the client's information into the search page then click **"Add New Client With This Information"** (Green Arrow)



Households

If the client is part of a household, create a household if one does not already exist. Entering data in HMIS for a new client in a household is similar to entering data for a single client. The key differences include:

- Search for, and add, each household member to HMIS.
- Create the household.
- Determine who is the head of household (HoH), then determine the relationship of each household member to the HoH.
- Complete the adult assessment for each adult member of the household and/or complete the child assessment for each child/minor in the household.
- Include the household when adding the Release of Information (ROI), project entry, etc.

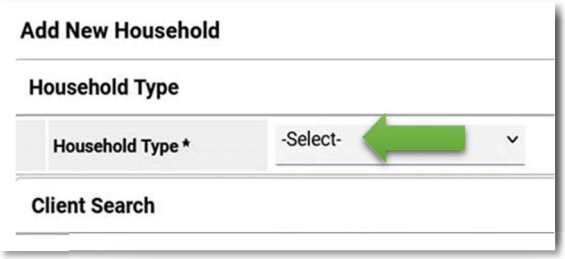
Scenario
Your clients are a single mom (the head of household) and her child. Search for each client in the household, then add any client not already in HMIS
Go to the Summary page for the Head of Household

Best Practice in adding household members to HMIS

- Start by searching for the Head of Household (HoH)
- Add the HoH to HMIS.
- Search for the next member of the household.
- Add that member to HMIS if not found.
- Repeat the process until all members added.
- Create the household immediately after adding all members to HMIS.

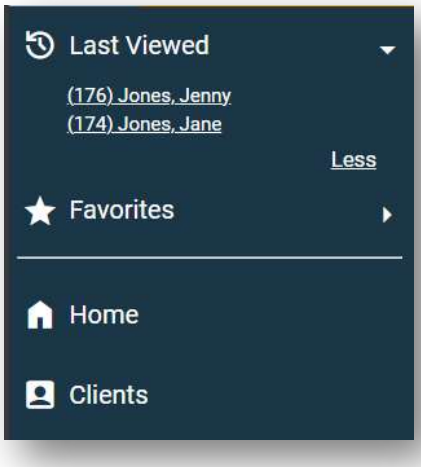
Scroll down to the Households box. Click **Start New Household**.

Add New Household screen displays.



Household Type: select best match (green arrow). *In this scenario **Female Single Parent** is the best match.*

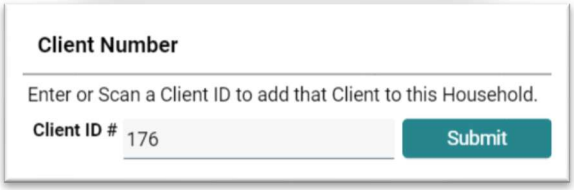
Immediately below is **Client Search.**



You can quickly find the Client IDs for the household members you just created by clicking **Last Viewed** in the left-hand side menu.

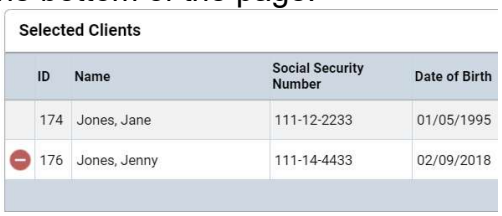
Scroll down **Client Number**. Enter the daughter's HMIS number.

Click **Submit**.



The household member will be added to the **Selected Clients** list at the bottom of the page.

Repeat until you've added all household members



Selected Clients

ID	Name	Social Security Number	Date of Birth
174	Jones, Jane	111-12-2233	01/05/1995
176	Jones, Jenny	111-14-4433	02/09/2018

When finished adding all household members **Click Continue** at the bottom of the screen

On the next screen, you will see the list of members and some of their information click **Save and Exit**

A household has now been created and you can continue with the next steps.

STEP 3 – Create ROI In HMIS

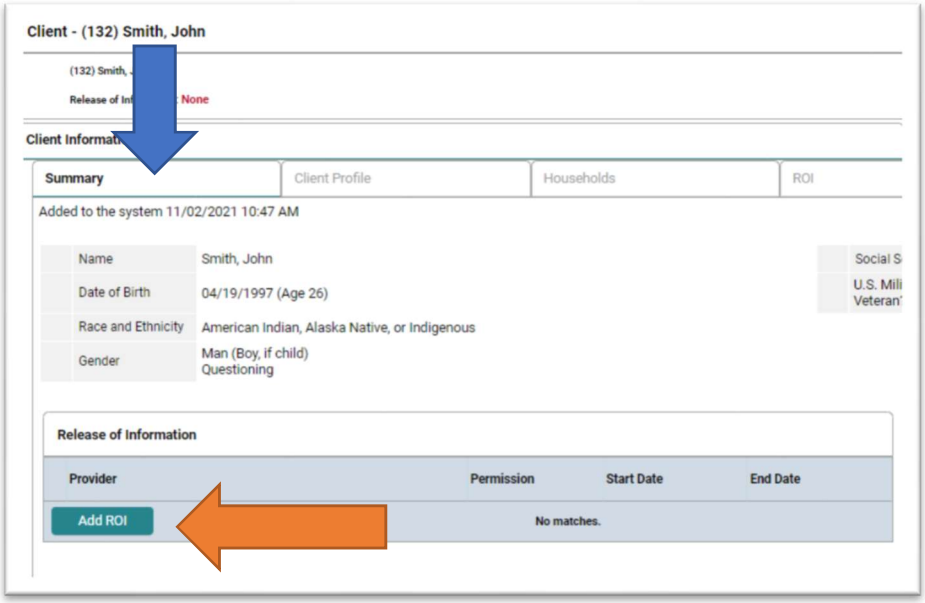
As part of the CES intake process the person conducting the intake should have discussed the **Client informed Consent and Release of Information**. There are 3 possible outcomes from that conversation.

- Client Signed Release of information and Agreed to share data
- Client Signed Release of Information and Declined to share data
- Client Refused to sign Release of Information and declined to share data

You must create a Release of Information (ROI) in HMIS.

If you're not already on the client summary page, **click on Client Summary Tab** (Blue Arrow)

Click Add ROI on the Release of information Dashlet (Orange Arrow)

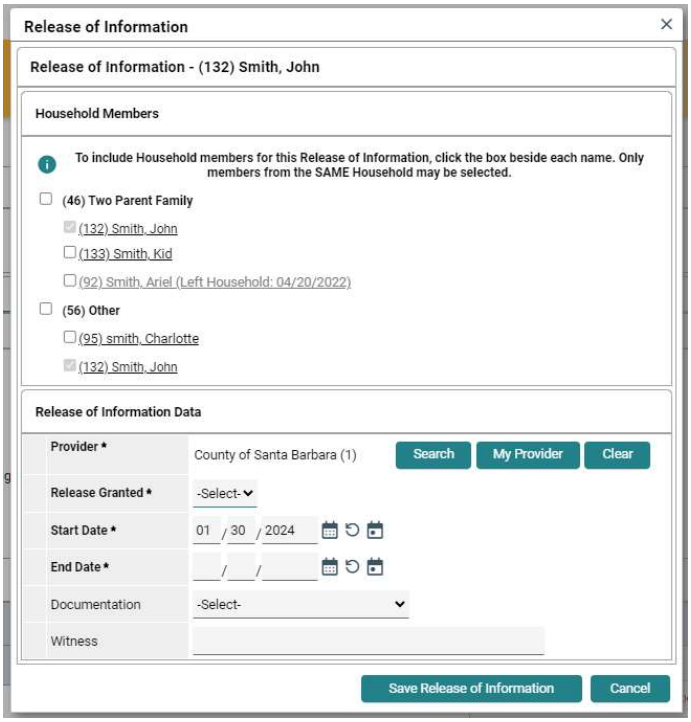


If the client presented as part of a household check the box next to each member of the household expected to be housed with the client and that either signed or were included in an ROI

If the client **Signed the ROI** and **agreed** to share data. **Release Granted** should be set to **Yes**

If the **client signed the ROI** and decided **NOT** to share **data Release Granted** should be Set to **No**

If the **Client did not sign an ROI**. The client should be entered into the System as an Anonymous Client. You must also create an ROI in HMIS, and set **Release Granted** to **No**. Don't forget to also set **Documentation** as None"

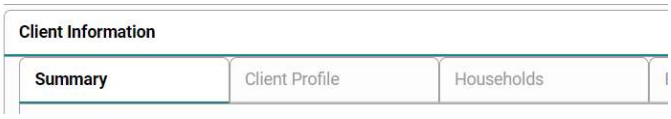


STEP 4 – Enroll Client in your Project

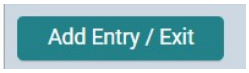
If you provided services other than CES to the client, you must create an enrollment for that project.

Click on "Enter data as," and **select the project** funding the services provided to the client.

Go to the **Client Summary Tab**, if not already on it.

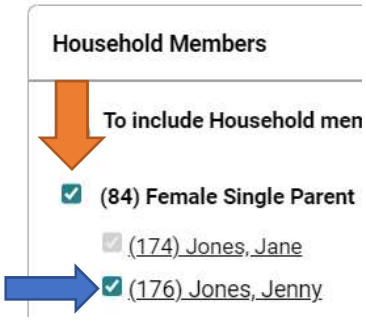


Click Add Entry/Exit



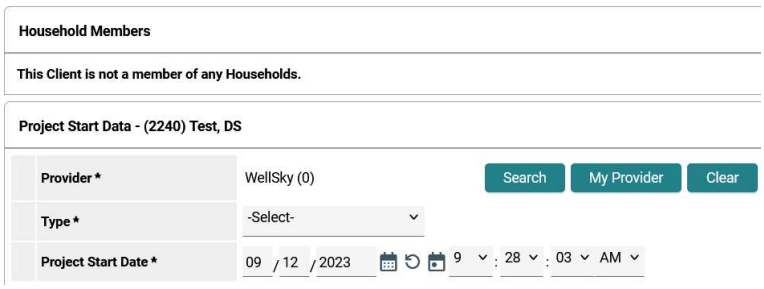
Household Only,
Check the boxes next to each member that will be receiving services along with the client (blue arrows)

If all clients in the household will be receiving services, you can check the box next to the household ID (orange Arrow)



Select HUD under Type: unless your project requires a special Entry Type (e.g. SSVF, RHY,)

Project start date should match the date the client started receiving services through this project.



Click **Save & Continue**

On the following screen **complete the Entry assessment** using the information you collected when working with the client. Remember to use the Child intake for minors (unless they are unaccompanied). For more information refer to the HMIS Workflow Manual in User Central.

once you've completed the assessment for the client(s)

Click Save & Exit

Households Only
make sure to complete the assessment for each household member before continuing.

You can move between clients by clicking on the client's name in the household members section

STEP 5 –Enter VI SPDAT into HMIS

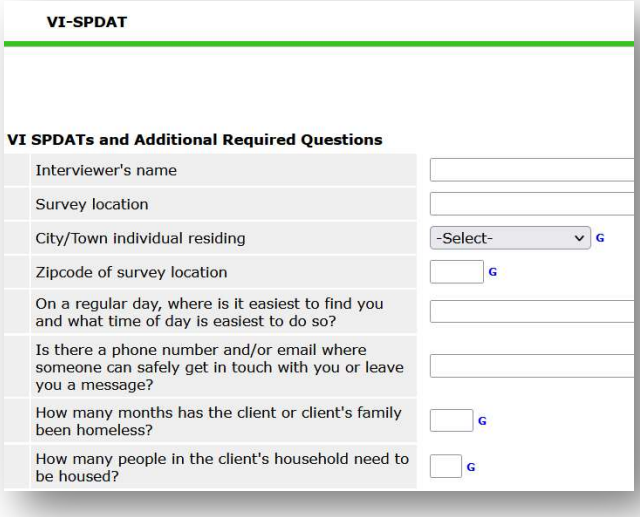
If you did not collect a new VI SPDAT, Skip this step

Enter data as **"CES Coordinated Entry System Shared – CA,"**

Go to the Summary Tab if not already there

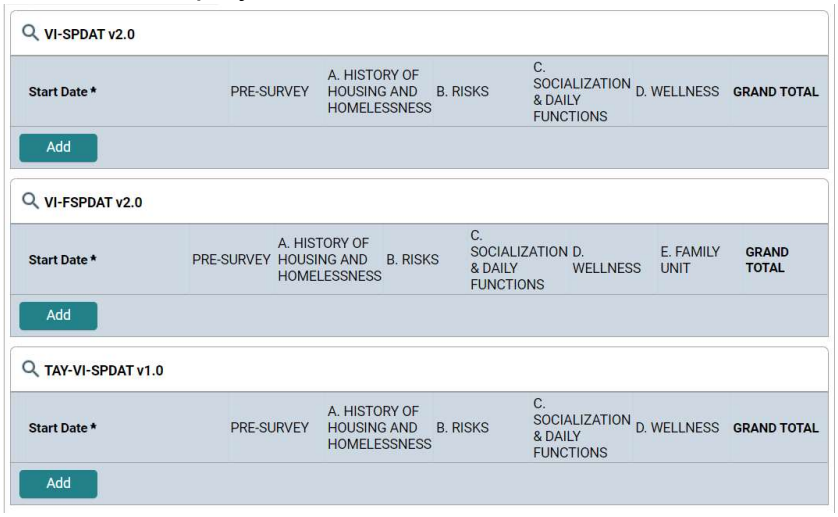
Scroll down to the **VI-SPDAT section**

Enter data into each of the data fields in "VI-SPDATS and Additional Required Questions:



Then scroll down until the 3 types of VI-SPDATs display:

1. **VI-SPDAT v2.0**: select if your client is single;
2. **VI-FSPDAT v2.0**: select if your client is in a family/household with minor children
3. **TAY-VI-SPDAT v1.0**: select if your client is 18-24 years of age and is the head of household.

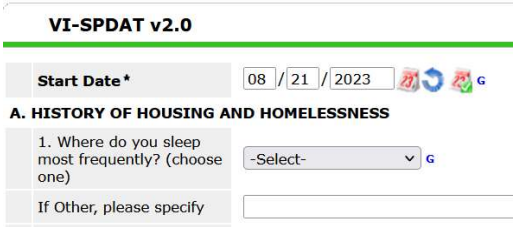


STEP 5 –Enter VI SPDAT into HMIS

Once you've determined which VI-SPDAT to complete, **click Add**. In this example, the VI-SPDAT v2.0 (singles) has been selected.

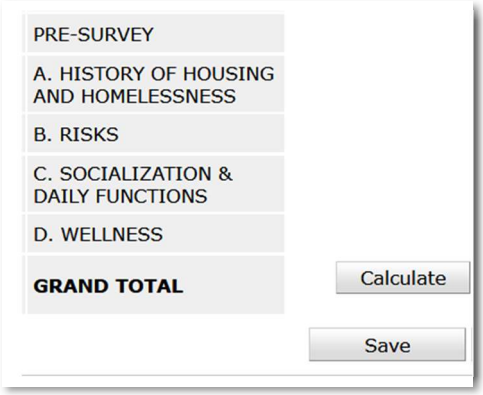
Start Date: Enter the date the VI-SPDAT was administered.

Enter data for each VI-SPDAT question

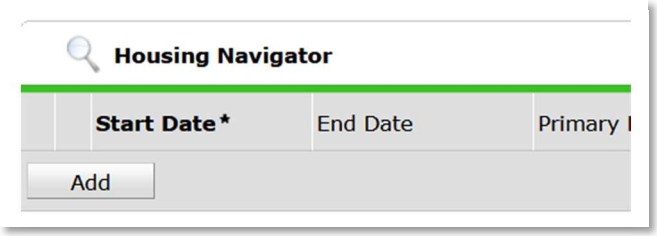


At the bottom of the page, you will see Grand Total:

- Click **Calculate**
- Click **Save**

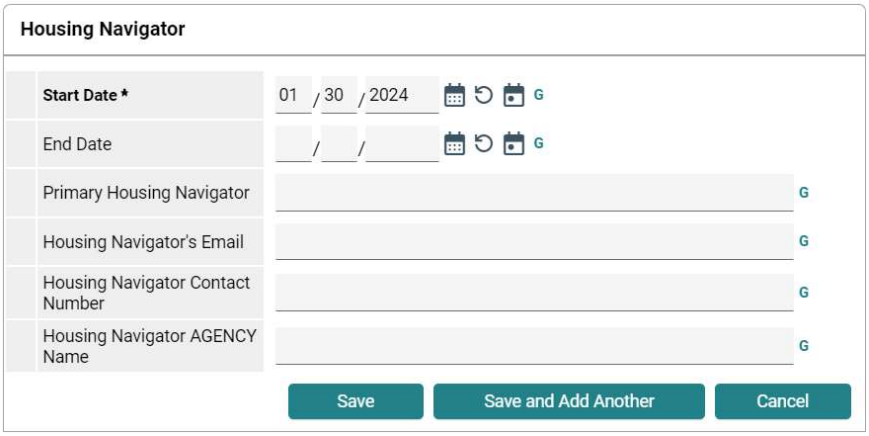


If you are a Housing Navigator, **click Add,** then enter your name in the Primary Housing Navigator field, then enter your contact information in the remaining fields.



Complete the form, and click Save

Not a Housing Navigator? Do not complete.

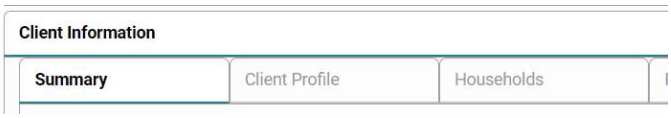


STEP 6 –Enroll Client in Shared CES Project

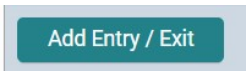
If your client has an active enrollment in the Shared CES project Skip this step.

Enter data as, "CES Coordinated Entry System Shared – CA"

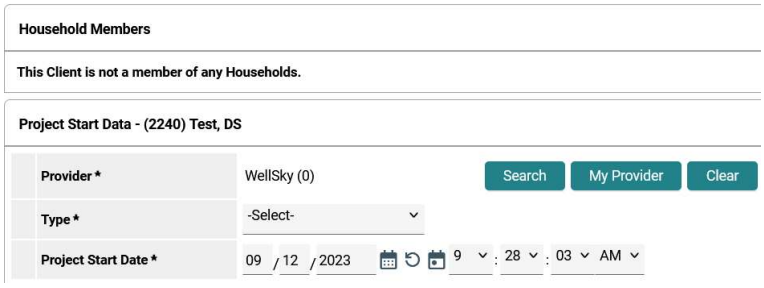
Go to the **Client Summary Tab**, if not already on it.



Click Add Entry/Exit



Select HUD under Type
Enter the date the VI SPDAT was administered as the Project Start Date.



Complete the Assessment.

At the bottom of the Assessment there are places to Track **Current Living situation**, **Coordinated Entry Assessment Events**, and **Coordinated Entry Referral Events**. Those are covered on a separate page.

If you created the CES enrollment today please continue to and complete steps 7-9

STEP 7 –Record CES Assessment Event

If you did not collect a new VI SPDAT during this interaction skip this step.

If the active CES enrollment was created before today, and you conducted a new VI SPDAT during your interaction with the client, **Enter data as, "**CES Coordinated Entry System Shared – CA" and add an Interim Review for the date when the VI SPDAT was collected.

If you are continuing this after creating a new CES Enrollment, and you conducted a new VI SPDAT during your interaction with the client continue the following steps from the Enrollment Entry which should still be open.

Scroll down to **"Coordinated Entry Assessment**", and **click Add.**

Date of Assessment: defaults program entry date.

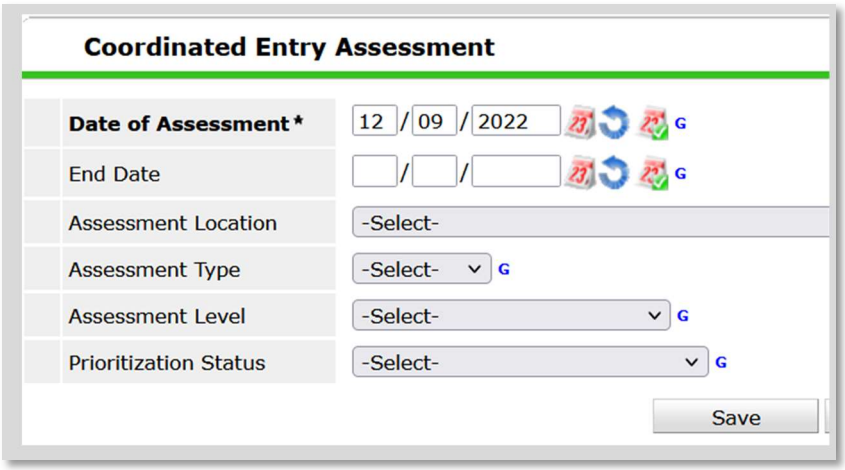
Assessment Location: select best match.

Assessment Type: select Phone OR In Person.

Assessment Level: select Housing Needs Assessment.

Prioritization Status: select best match.

Click **Save**.



Don't know if your client has been placed on the Prioritization List?
Check with someone in your agency with access to the current CES list and ask if your client is listed in any of the Priority groups.

If client is listed, select **Placed on Prioritization List**. If client is not listed in any groups, select **Not Placed on Prioritization List**.

If you are not sure, select **Not Placed on Prioritization List**.

STEP 8 – Update Current Living Situation in HMIS

If the active CES enrollment was created before today, and you learned that the client's living situation changed during your interaction with the client, **Enter data as, "**CES Coordinated Entry System Shared – CA" and add an Interim Review for the date of the interaction with the client.

If you are continuing this after creating a new CES Enrollment, continue the following steps from the Enrollment Entry which should still be open

Scroll down until **Current Living Situation** displays. Click **Add**

Start Date: defaults to today's date. Change if necessary.

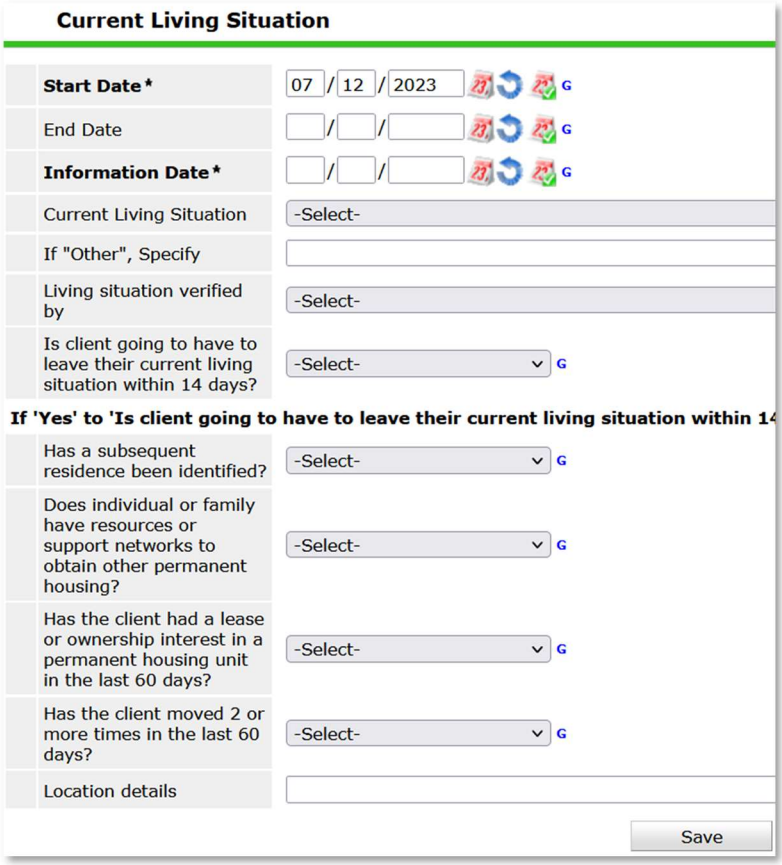
Information Date: date data was collected. Typically matches the **Start Date**.

Current Living Situation: select best match. If "Other" selected, enter data in **If "Other", Specify**.

Enter data in the remaining data fields if "Yes" was entered for **Is client going to have to leave their current living situation within 14 days?**

Client not leaving within 14 days? Or if I entered Client doesn't know or Client refused? Do not enter data in remaining fields

Click **Save**.



STEP 9 –Create/Update Referral Event

If the active CES enrollment was created before today, and you learned that the client's living situation changed during your interaction with the client, **Enter data as, "**CES Coordinated Entry System Shared – CA" and add an Interim Review for the date of the interaction with the client.

If you are continuing this after creating a new CES Enrollment, continue the following steps from the Enrollment Entry which should still be open

Coordinated Entry Events track referral efforts within HMIS. Once an event takes place, users must record it in HMIS

Update –if a Coordinated Entry Event already exists and this interaction was related to that event, Edit the existing Coordinated Entry Event. Scroll down to **"Coordinated Entry Event"** and click **Edit pencil**

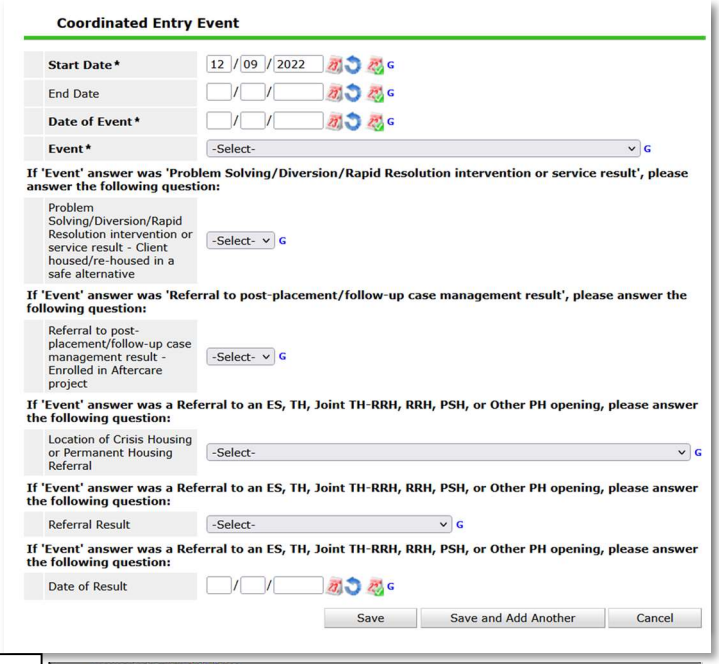
Add New –If this is a new event Scroll to **"Coordinated Entry Event"** and click **Add**

Start Date: defaults to project entry date

Event Date: enter date.

Event: select best match.

Answer the remaining questions that are relevant to the Event. Click **Save**.



Most housing referral events are tracked by county staff. Some of the following events can be tracked by Providers.

- Referral to Diversion
- Referral to CES Housing needs Assessment
- Referral to Emergency Shelter
- Referral to post-placement/follow-up case management
- Referral to Transitional Housing
- Referral to Street Outreach

NOTE Some agencies track their own housing referral events in special cases (example SSVF, DSS)*

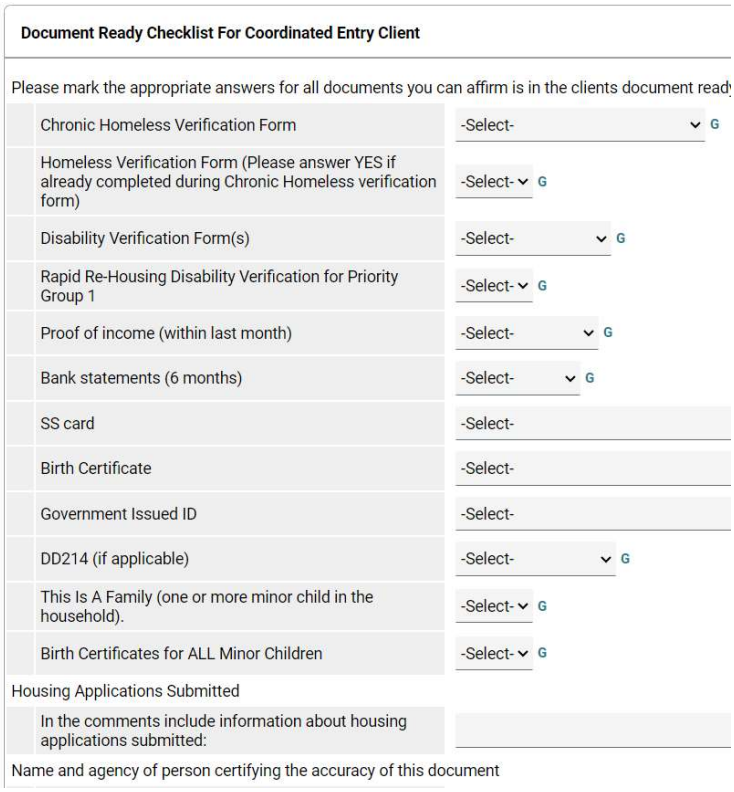
STEP 10 –Update Document ready Checklist

It is essential to the referral process that clients have all of the documents required for a housing program application.

The Document Ready Checklist looks to make the documentation process easier.

Enter data as **"CES Coordinated Entry System Shared – CA,"** If this is not done the data entered and documents uploaded may not be available to others participating in CES

Click on the Client Profile Tab, then scroll down

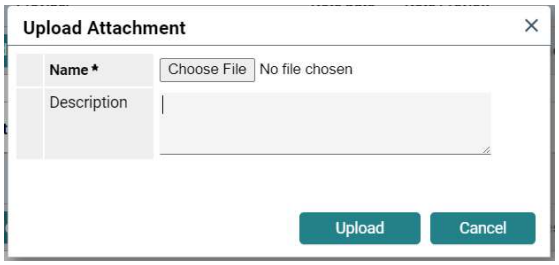


An Answer must be entered for each document. And an agency representative must certify the documents by entering their information at the bottom of the form. Click Save at the bottom of the page to record your changes.

Uploading Documents

If the client provided new documents, they should be scanned and uploaded to the client's HMIS Profile. On the Client Profile tab at the bottom there is a File Attachments Section. Click Add new File Attachment to select and upload a new file.

Choose the file on your computer, the
Add a description (preferably matching document ready item)
Click Upload



Done!

Diversion and Street Outreach Access Points

Diversion Hotline
AmeriCorps Street Outreach
City Net Street Outreach
Good Samaritan Street Outreach
PATH Street Outreach
Behavioral Wellness Street Outreach
FBSMV Street Outreach
SSVF Salvation Army Street Outreach
SSVF New Beginnings Street Outreach
SSVF Good Samaritan Street Outreach
United Way Santa Barbara County Outreach
Willbridge Street Outreach
YMCA Street Outreach

Physical Access Points

Carpinteria Regional Access Point
Carp Connect, Carpinteria Veterans Memorial Building Courtyard, Carpinteria

Goleta Regional Access Point
Showers of Blessing, St. Athanasius Orthodox Church, 300 Sumida Gdns. Ln., Goleta

Isla Vista Regional Access Points
Isla Vista Community Room, 970 Embarcadero Del Mar
UCSB Basic Needs

Lompoc Regional Access Points
BridgeHouse, 2025 Sweeney Road, Lompoc
Good Samaritan Diversion Office, 510 North I St, Lompoc
New Beginnings, Vandenberg Village Office, 3769 Constellation Rd., Suite B Lompoc
Santa Barbara County Social Services Family Focused Regional Access Point (Lompoc)

Santa Barbara Regional Access Points
Fr Virgil Cordano Day Center, 4020 Calle Real Ste. 2, Santa Barbara
PATH - Santa Barbara, 816 Cacique Street, Santa Barbara
The Salvation Army, Santa Barbara
Hospitality House, 423 Chapala St, Santa Barbara
Youth (18-24 yrs) Focused Santa Barbara Site: Haley Street Navigation Center, 701 E Haley Street, Santa Barbara.
Santa Barbara County Social Services Family Focused Regional Access Point (Santa Barbara)

Santa Maria Regional Access Points
Good Samaritan Shelter, Morrison Campus Diversion Office, 401 W. Morrison, Santa Maria
Salvation Army, Shower Site, 200 W Cook St., Santa Maria
Power of God Christian Center, Shower Site, 1503 North McClelland (Rancho Bowl Parking Lot), Santa Maria
Youth (18-24) Focused Santa Maria Site: Fighting Back Santa Maria Valley, 201 S. Miller Street #107 Santa Maria
Santa Barbara County Social Services Family Focused Regional Access Point (Santa Maria)

Solvang Regional Access Point
Santa Ynez People Helping People, 545 N. Alisal Road, Solvang