

Coordinated Entry Assessor Workflow



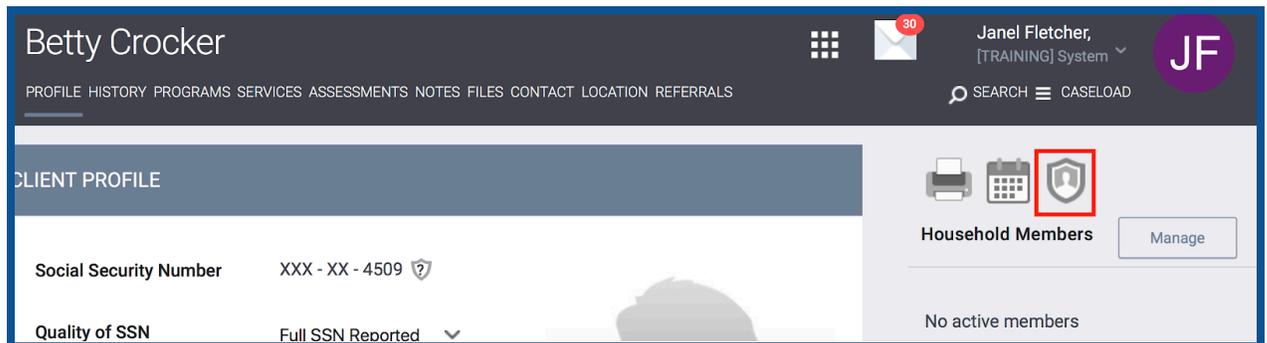
The purpose of this workflow document is to show the Coordinated Entry Assessor Workflow starting August 15, 2022. Assessment Only agencies are now required to complete a minimal Coordinated Entry program enrollment and to record the Current Living Situation assessment for folks who complete a Coordinated Assessment (VI-SPDAT or VI-F-SPDAT) at their agency. This workflow will begin with a refresher on how to review the ROI prior to entering data in HMIS.

I. First, search for the person and Review the Release Of Information (ROI).

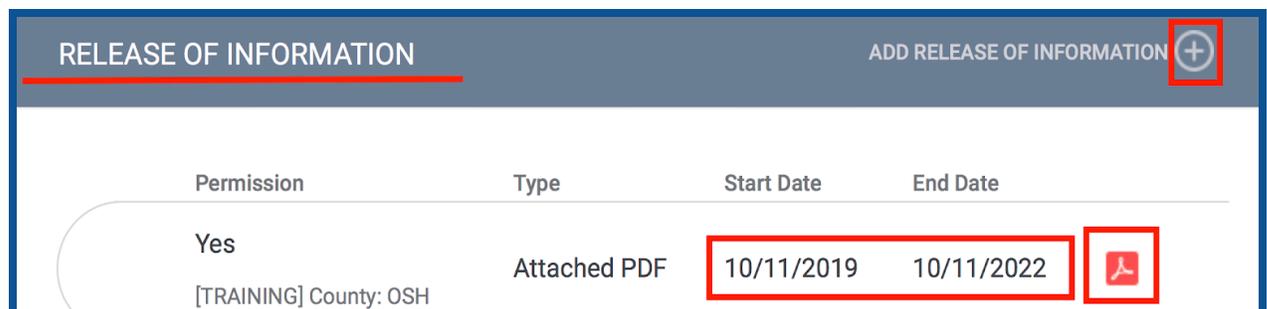
- 1) Always search for the person prior to creating a new client record. This will prevent duplicates in the system. Individuals can be searched by typing partial first name, last name, social security number (xxx-xx-xxxx or last 4 digits), or date of birth (mm/dd/yyyy).



- 2) If the person appears, click the shield icon to review the attached PDF ROI.



- 3) In the Release of Information section of the screen, open the PDF and review the boxes initialed by the individual. The boxes initialed by this person identifies what information they consent to have entered in HMIS. If a box is not initialed by the person, they do not consent to having that information entered. Double check expiration date on the PDF ROI matches the expiration date in Clarity.



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II. Configure the Household.

- 4) Complete these steps for every member of the household so that each person has a profile created and an ROI uploaded. Select ADD CLIENT to add individuals that did not appear during your search.

SEARCH FOR A CLIENT

ADD CLIENT

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

- 5) From the Head of Household's profile, select MANAGE on the right side of the screen.

Zebra Cake

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

Janel Fletcher, [TRAINING] System

SEARCH CASELOAD

CLIENT PROFILE

Household Members **Manage**

- 6) Next, choose a family member under the Your recent client searches accessed section to add to the household. A plus sign will appear when you move your mouse to the right of the family member's name.

Zebra Cake

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

Janel Fletcher, [TRAINING] System

SEARCH CASELOAD

HOUSEHOLD MANAGEMENT

Search for a Household Member

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

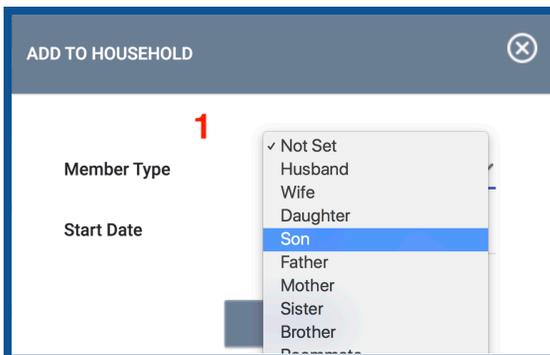
Household Members

No active members

Your recent client searches accessed:

Baby Zebra Cake	8974	
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- 7) Select the Member type of the person you just selected (ex: Child), and click Save (screenshot 1). Next, update the member type for the Head of Household (HoH) by moving your mouse to the right so the edit symbol will appear (screenshot 2). Note, the HoH has a star next to their member type. If you have the wrong person as HoH, you can also update the HoH here (screenshot 3), and save. Once the family is configured each member will appear with the member type and as in screenshot 4.

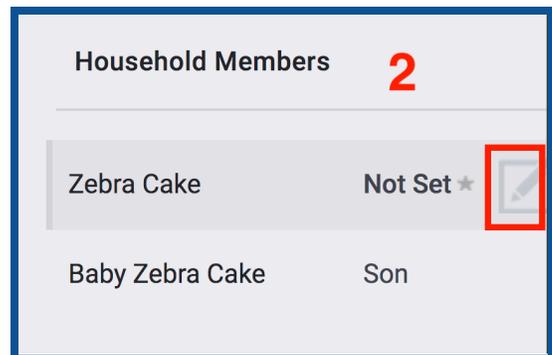


ADD TO HOUSEHOLD

Member Type **1**

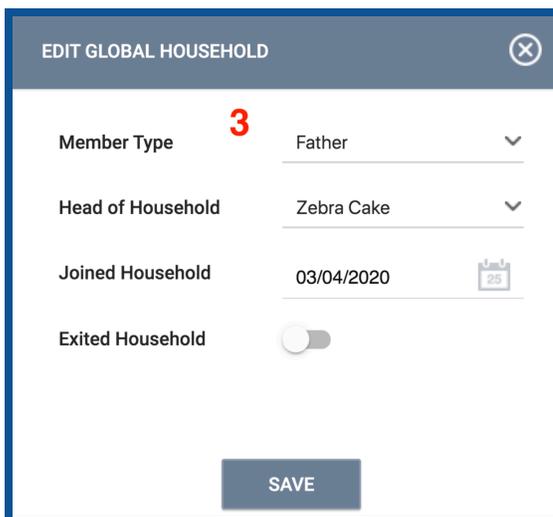
Start Date

- Not Set
- Husband
- Wife
- Daughter
- Son
- Father
- Mother
- Sister
- Brother
- Domestic Partner



Household Members **2**

Zebra Cake	Not Set *	
Baby Zebra Cake	Son	



EDIT GLOBAL HOUSEHOLD

Member Type **3** Father

Head of Household Zebra Cake

Joined Household 03/04/2020

Exited Household

SAVE

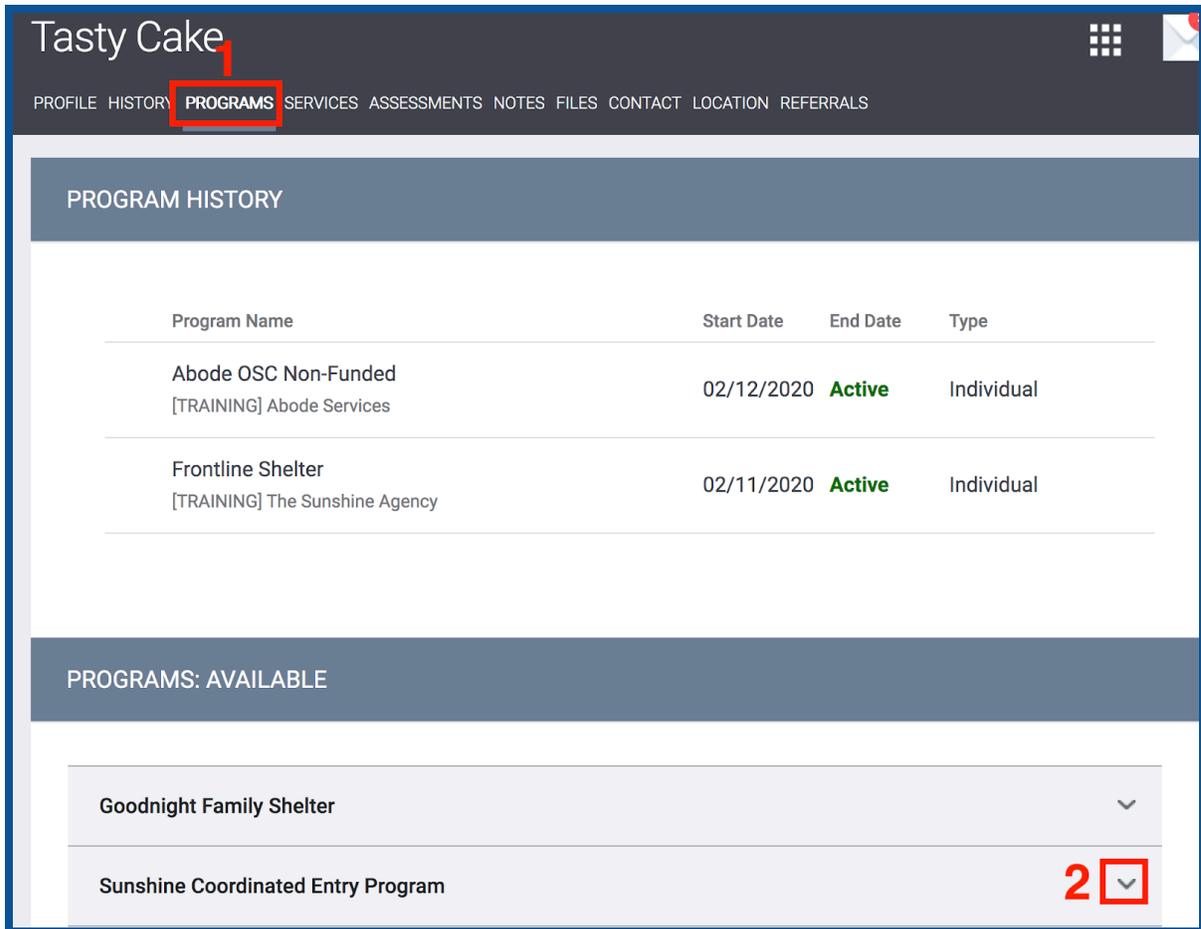


Household Members **4**

Zebra Cake	Father *
Baby Zebra Cake	Son

III. Next, enroll into the Coordinated Entry Program.

- 8) As in the numbered screenshots below, (1) click on the Programs tab, next, (2) click on the agency coordinated entry program [AGENCY NAME] Coordinated Entry, and (3) toggle on minor children in the household and click enroll (4). Note households of more than one adult should not toggle on the group member. **Separate enrollments should be completed for families with only adults in the household.** Complete the questions that appear on the enrollment screen and save (not pictured).



Tasty Cake

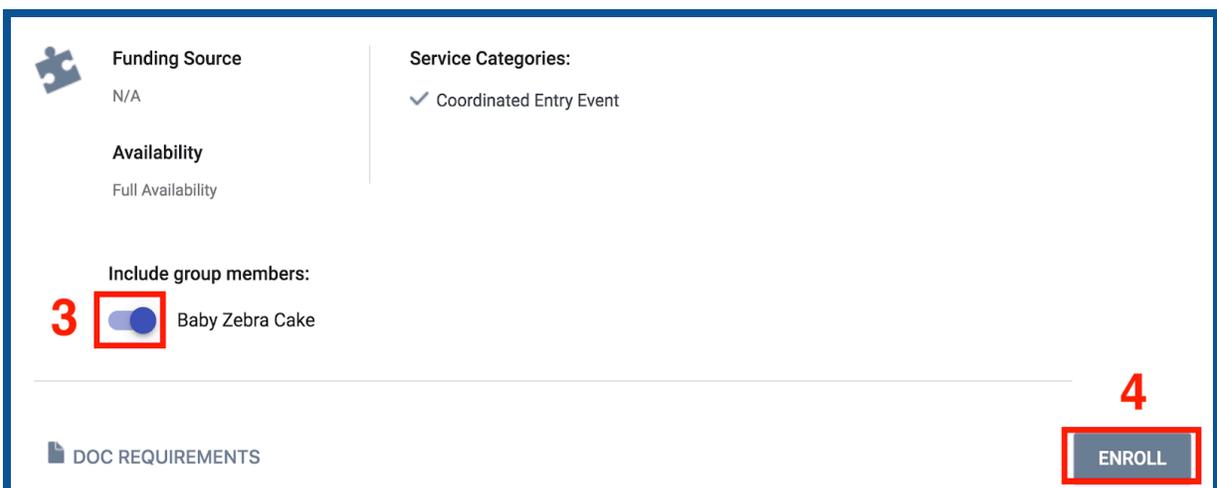
PROFILE HISTORY **PROGRAMS** SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Abode OSC Non-Funded [TRAINING] Abode Services	02/12/2020	Active	Individual
Frontline Shelter [TRAINING] The Sunshine Agency	02/11/2020	Active	Individual

PROGRAMS: AVAILABLE

- Goodnight Family Shelter
- Sunshine Coordinated Entry Program **2** 



 **Funding Source**
N/A

Availability
Full Availability

Service Categories:
 Coordinated Entry Event

3  **Include group members:**
Baby Zebra Cake

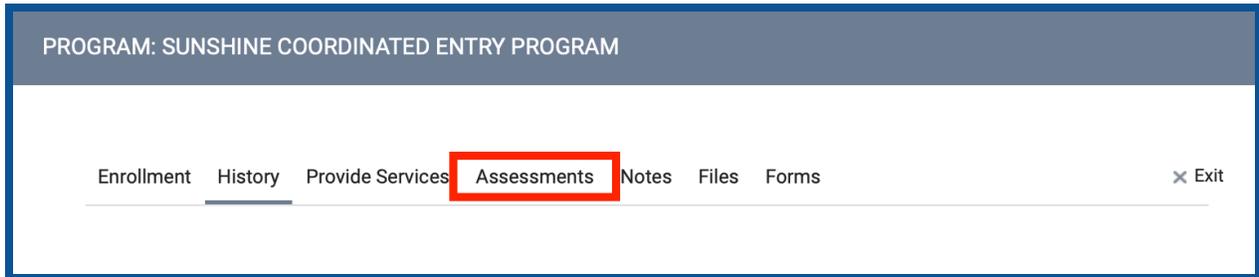
4 **ENROLL**

 DOC REQUIREMENTS

Coordinated Entry Assessor Workflow



After enrolling the client in the program, you will arrive on the program enrollment menu. This menu will allow you to record the Coordinated Entry Assessment (VI-SPDAT and VI-F-SPDAT) and the Current Living Situation assessment. Select the Assessments tab to view these assessments.



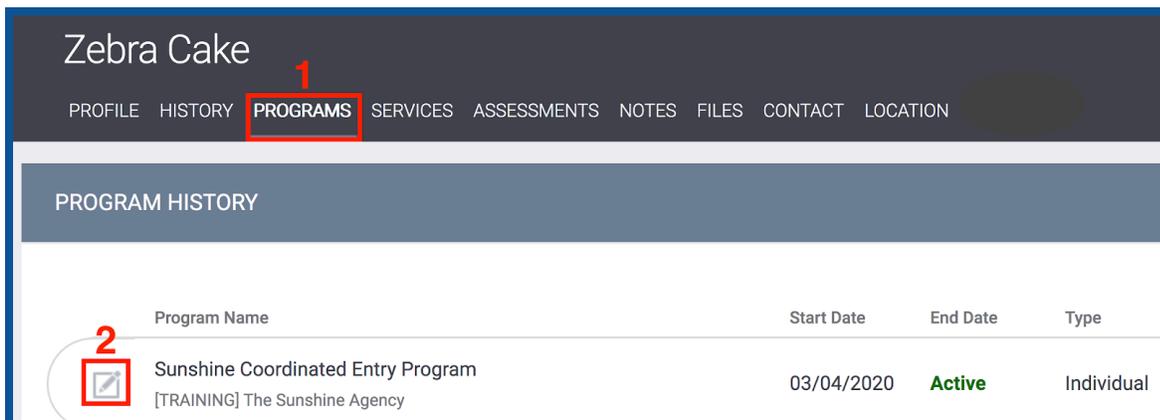
III. Record the Current Living Situation and Coordinated Entry Assessments

Living situations are used to understand how many times a person is engaged while experiencing homelessness and can also be used to document homeless chronicity and risk of imminent homelessness.

When to record the Current Living Situation Assessment:

Coordinated Entry assessors are expected to record every direct contact made with each client in the HMIS via data element 4.12, Current Living Situation. ([HUD 2020 HMIS Data Standards Manual - Version 1.6](#)).” In HMIS, this is the Current Living Situation Assessment.

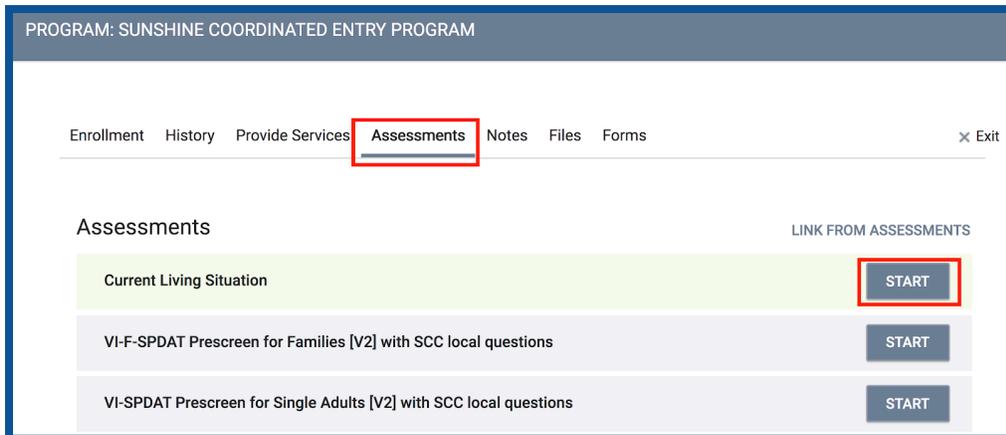
- 9) At enrollment and every time a person returns to your agency, open the program enrollment to record the Current Living Situation Assessment.



Coordinated Entry Assessor Workflow



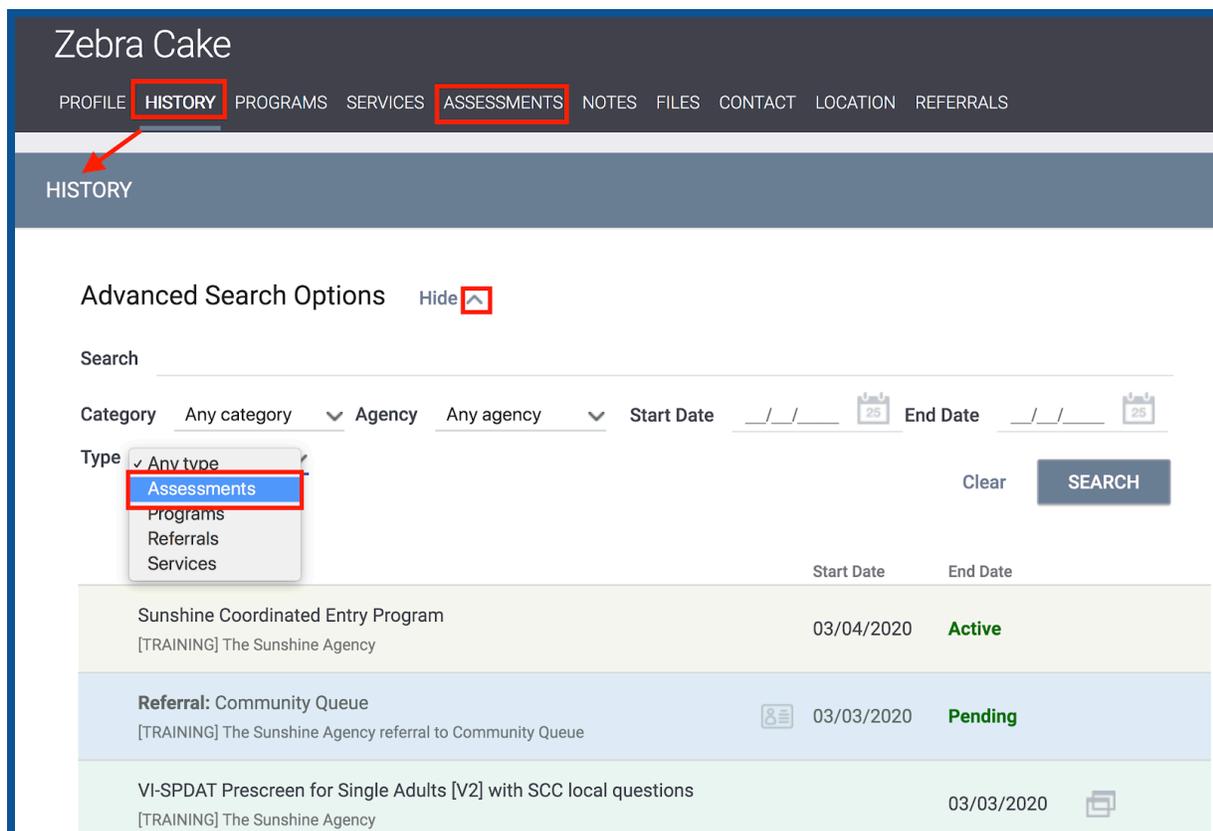
10) Next, click on the Assessments Tab and click START on the Current Living Situation assessment. Complete the Assessment questions and save.



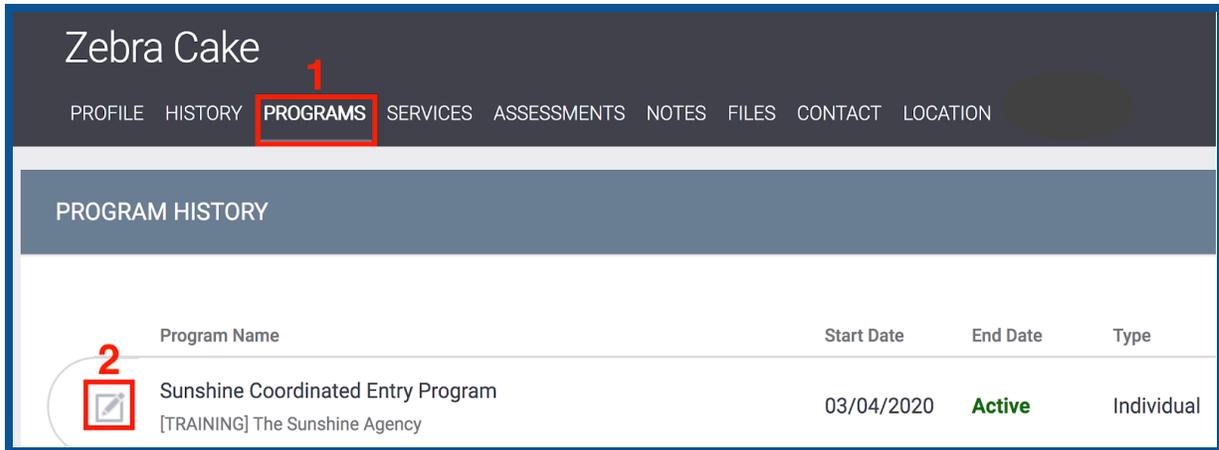
When to record the Coordinated Entry Assessment:

Complete the VI-SPDAT if it has been more than one year since the last VI-SPDAT was completed, or if the client has experienced a significant change/life event since the last VI-SPDAT (e.g. change in health, income, and/or family structure). **Please do not record a new assessment before 365 days unless someone experiences a significant change since their last assessment.**

11) Check to see if a person has an assessment recorded by clicking the client level History or Assessment tab. History tab pictured below.



12) If the person does not have an assessment completed in the time frame, record a new assessment in the program. From the profile screen, click on programs (1) and open the program enrollment (2).



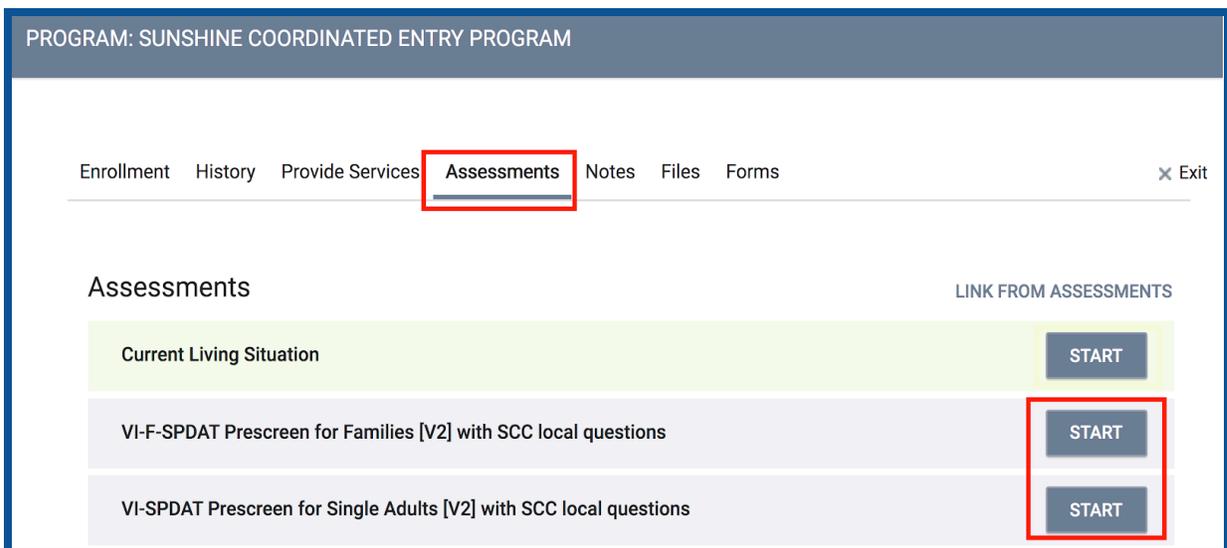
Zebra Cake

PROFILE HISTORY **PROGRAMS** SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
 Sunshine Coordinated Entry Program [TRAINING] The Sunshine Agency	03/04/2020	Active	Individual

13) Next, click on the Assessments Tab, complete the Coordinated Entry Assessment (VI-SPDAT/ VI-F-SPDAT/VI-Y-SPDAT) and save.



PROGRAM: SUNSHINE COORDINATED ENTRY PROGRAM

Enrollment History Provide Services **Assessments** Notes Files Forms ✕ Exit

Assessments LINK FROM ASSESSMENTS

Current Living Situation	START
VI-F-SPDAT Prescreen for Families [V2] with SCC local questions	START
VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions	START

Coordinated Entry Assessor Workflow



- 14) After completing the VI-SPDAT, review the client's score. Only clients who score **4 or higher** on the VI-SPDAT, regardless of veteran status, should be referred to the queue - toggle on the **Community Housing Queue ONLY** to refer them to the correct queue. **Assessors should NEVER refer clients to the queue called Administration Only/CET.**

VI-SPDAT-V2 Score Summary

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	0	RISKS	3
SOCIALIZATION & DAILY FUNCTION	3	WELLNESS	6
VI-SPDAT-V2 PRE-SCREEN TOTAL		12	

Community Housing Queue 

Administration Only/CET 

REFER DIRECTLY TO COMMUNITY QUEUE(S)

