Training for Coordinated Entry System in Bitfocus Clarity Human Services (HMIS)

PART ONE

Developed by the
Kansas Statewide Homeless Coalition

For questions or concerns, please email ces@kshomeless.com

Transition Summary

The Kansas Balance of State Continuum of Care has been operating the Coordinated Entry System manually since switching HMIS Vendors.

- As of February 1, 2021, the Coordinated Entry System will be available for use in the HMIS System (Clarity Human Services). Agencies will be able to start entering Homeless VI-SPDATs into the system and sending them to the CES List for their region.
- As of February 1st, only VI-SPDATs completed on or after February 1st should be entered into Clarity.
    - The entry of VI-SPDATs that were completed prior to February 1st will be determined by the Coordinated Entry Committee on February 5th. Stay tuned.
- Prevention VI-SPDATs will not be available at this time in the system. We must continue to use our manual process for Prevention.

Training Summary

This training is **Part One of a Three Part Series** for Coordinated Entry End Users within the Kansas Balance of State CoC.

This training will cover the following:

1. Client Enrollment into the Coordinated Entry System
2. Entering the VI-SPDAT into Clarity Human Services
3. Referral to the Community Queue (also known as the CES List)

Training Summary

Part Two of the training is not required for End Users. Part Two covers how to take clients off the CES List and make referrals to agencies. *Therefore, this training is not available to the public but only to individuals that will be sending referrals.

Part Three is required for End Users that will be <u>receiving</u> CES referrals to fill their program openings in HMIS. This training will cover how agencies accept referrals that have been sent to them.

Training Summary

*End users must have already completed their HMIS training and be approved to access Clarity Human Services.

*End users must be trained in how to conduct the VI-SPDATs prior to being granted access to Coordinated Entry System in Clarity Human Services.

You must complete a survey after you complete this training prior to receiving access to the Coordinated Entry System in Clarity Human Services.

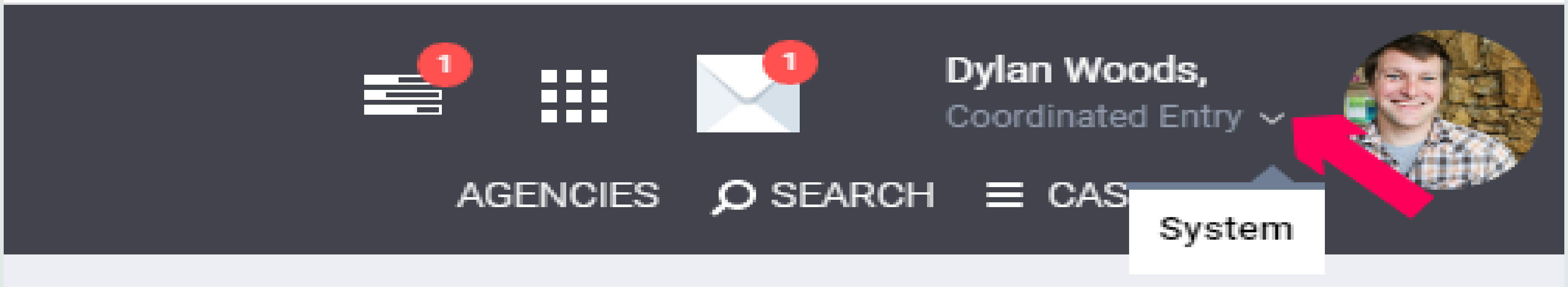
New HMIS and CES Workflow

1. Search for or Add Client
2. Enroll client into CES
3. Add Coordinated Entry Event
   - *New Requirement from HUD*
4. Complete Current Living Situation Assessment
   - *New Requirement from HUD*
5. Enter VI-SPDAT
6. Make Referral to Community Queue (aka CES List)
7. **Matchmakers Only** Send CES Referral to Agency
8. Agency accepts or denies CES referral
9. If accepted, agency enrolls client into their program (program enrollment will automatically accept referral.)

As of February 1, 2021, all HMIS agencies that are required to use CES are no longer allowed to enroll clients without a connected CES Referral.

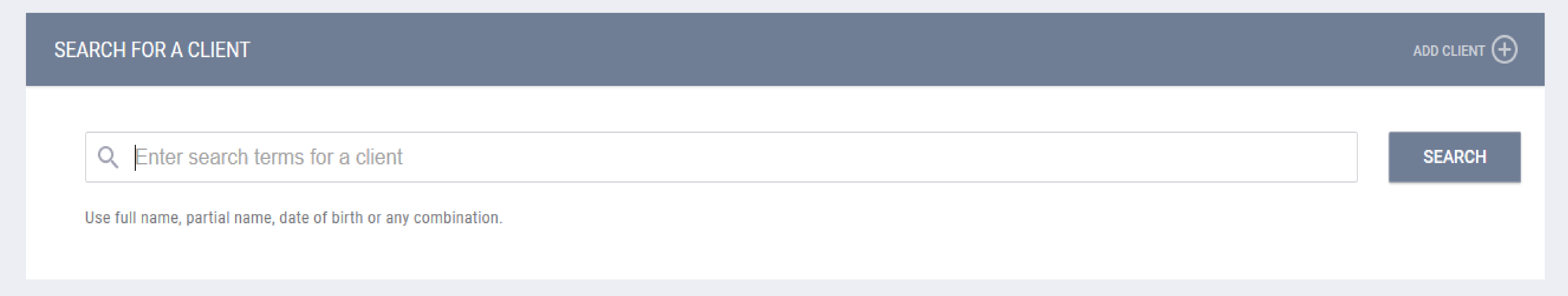
Step One:
Switch to the Coordinated Entry "Agency"

- In the top right corner of the screen, click the arrow icon next to your agencies name to switch to the Coordinated Entry "agency".



Step Two:
Select or Add the client

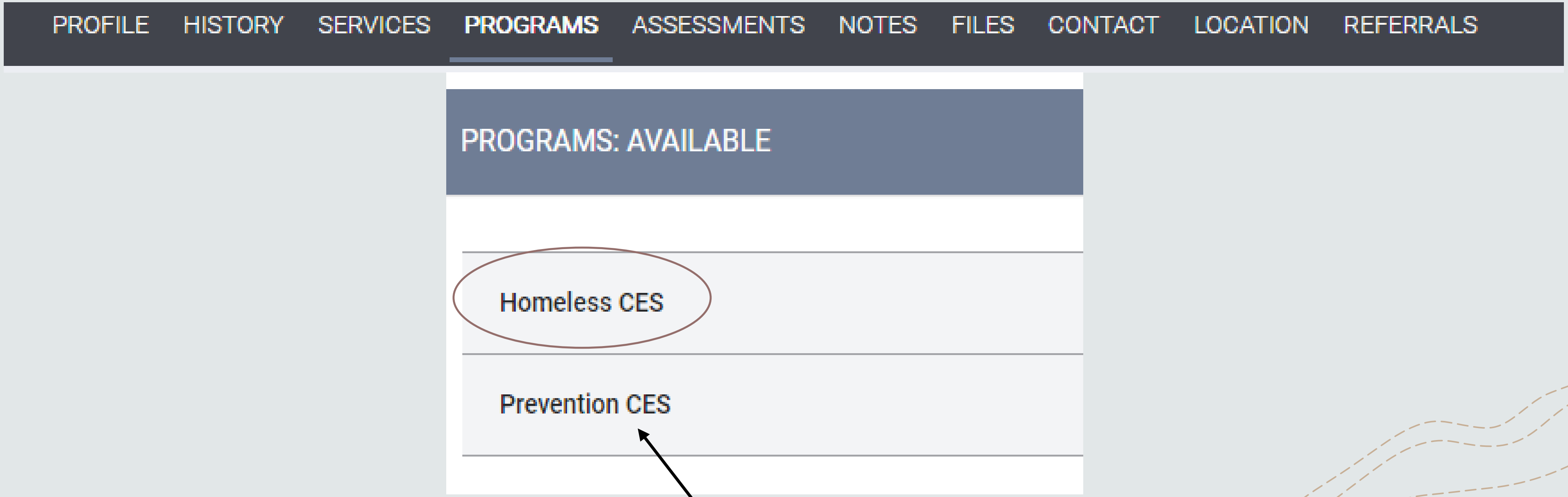
- Search for the client you are working with. Select the name to go to their profile.



- For information on how to create a new client, please visit: https://get.clarityhs.help/hc/en-us/articles/115000411407-How-Do-I-Create-a-New-Client-Record-

Step Three:
Program Enrollment

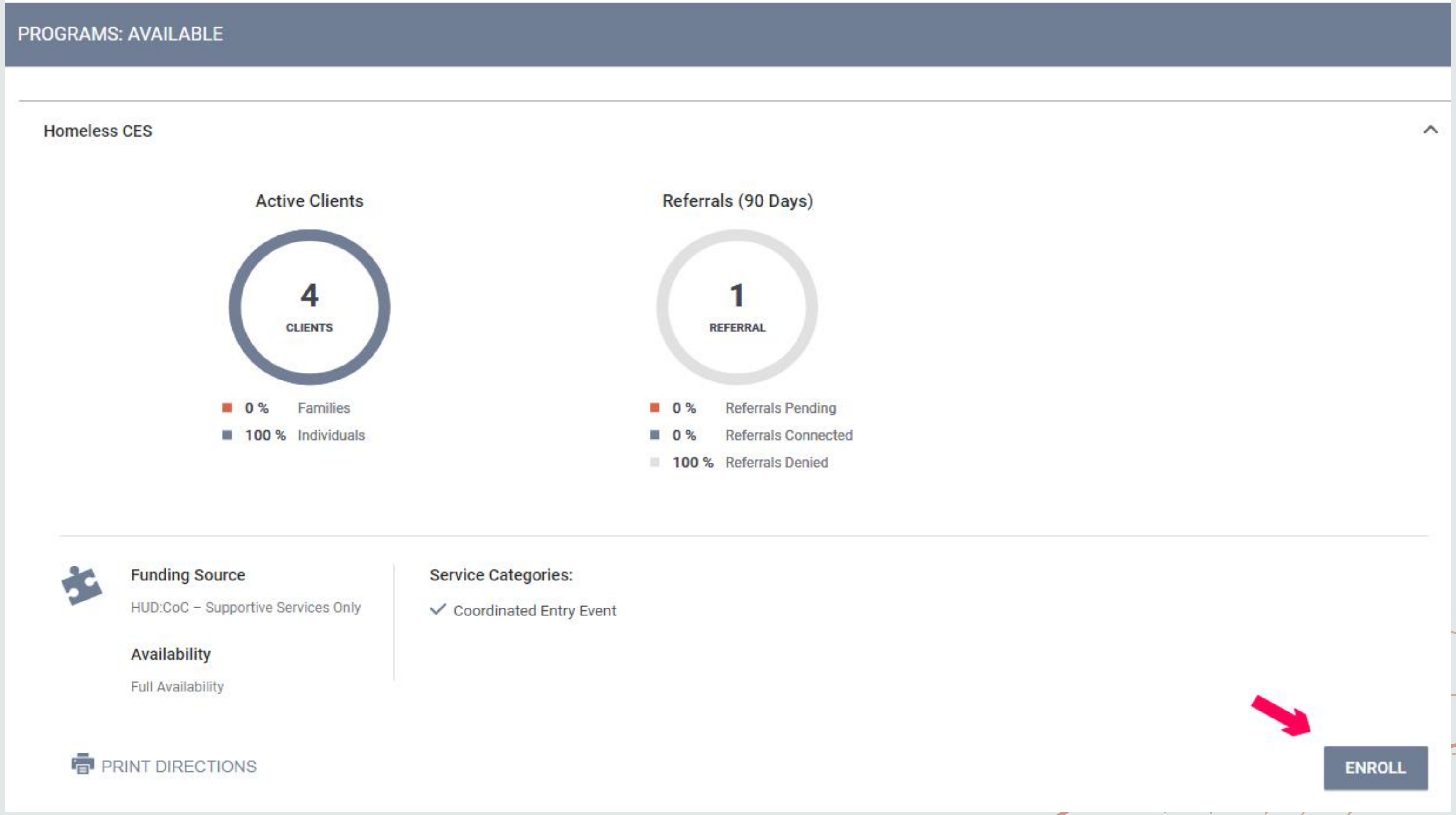
+ Select the "Programs" tab from the top menu. From "Programs: Available" select either Homeless CES for households who are currently homeless or Prevention CES for households at risk of losing housing.



Not currently available. Release date TBD.

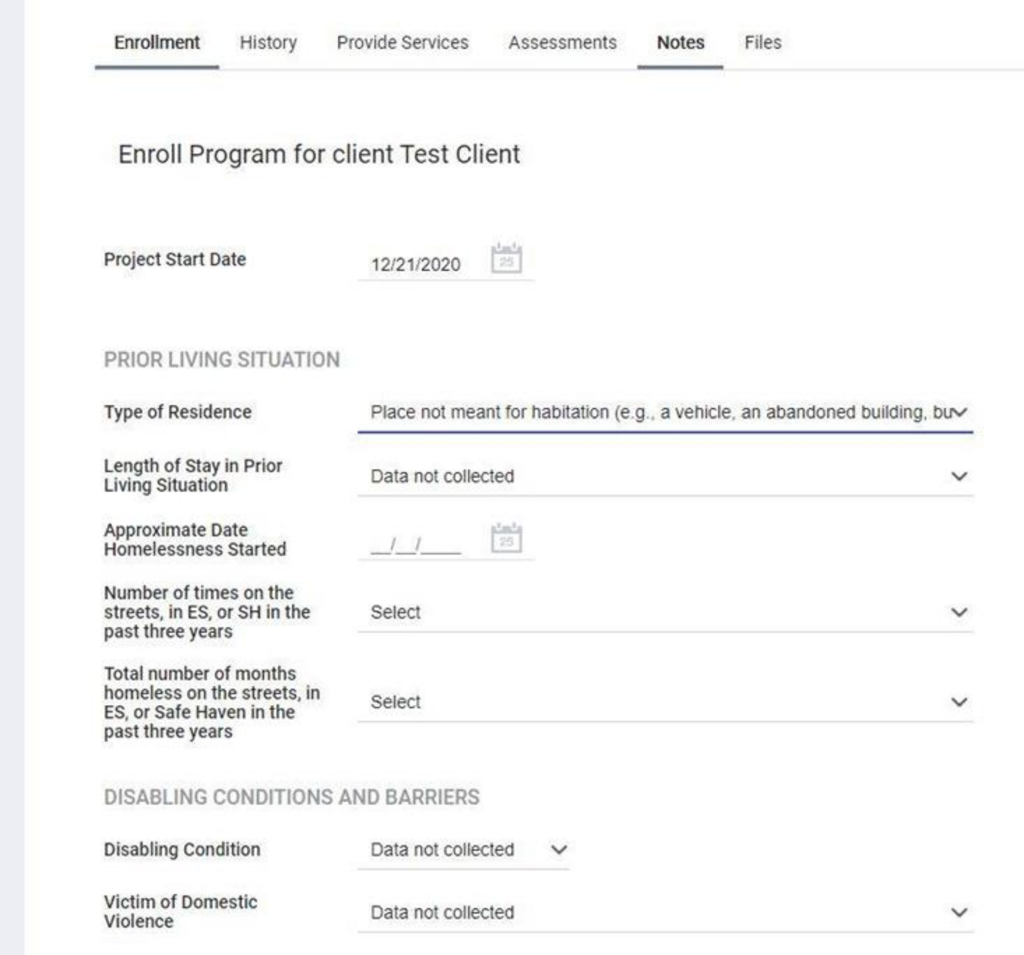
Step Four:
Program Enrollment

+ Once you have selected the program and selected any additional members of the household you would like to include, select the "Enroll" button.



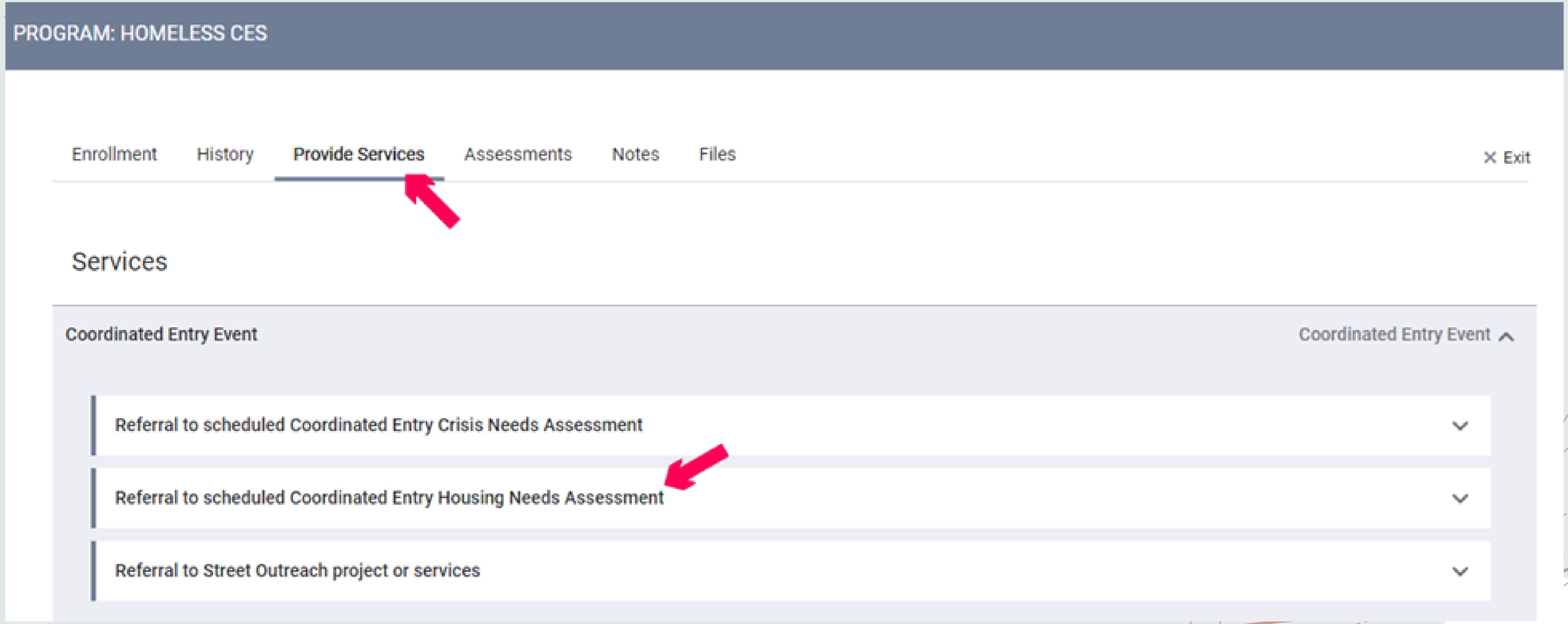
Step Five:
Program Enrollment Data

- Enter the initial information needed for enrollment. Select the "Save & Close" button.



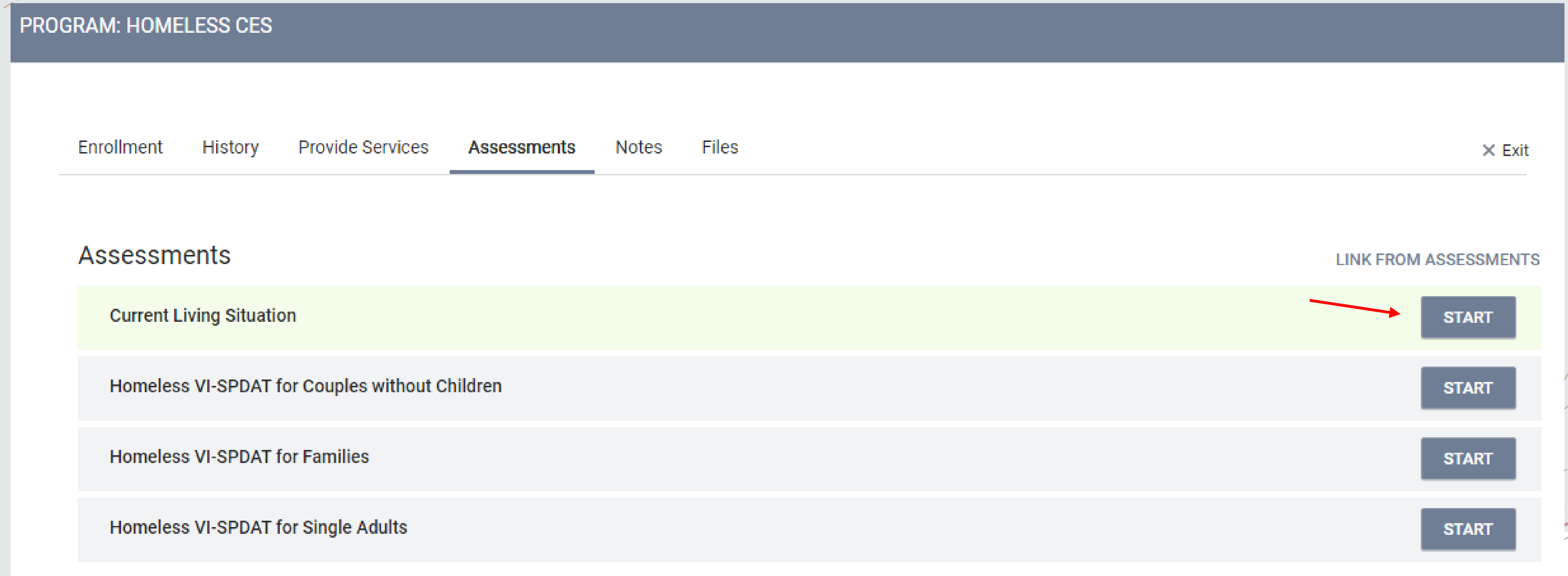
Step Six:
Coordinated Entry Event

- On the program menu, select "Provide Services" and then click "Coordinated Entry Event" under the Services menu. Select "Referral to scheduled Coordinated Entry Housing Needs Assessment", enter any desired service notes, and select the "Submit" button.



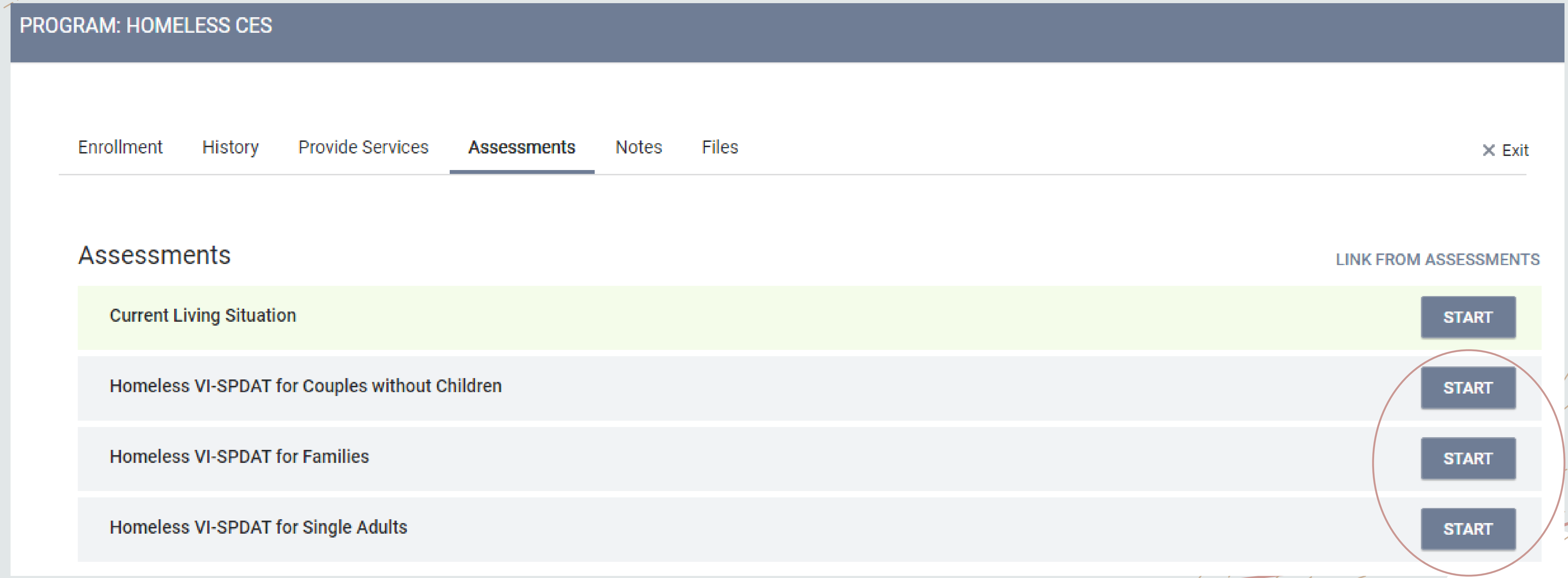
Step Seven: Current Living Situation Assessment

- On the program menu, select "Assessments" and then click the "Start" button next to Current Living Situation. Answer each of the questions and then click the "Save" button.



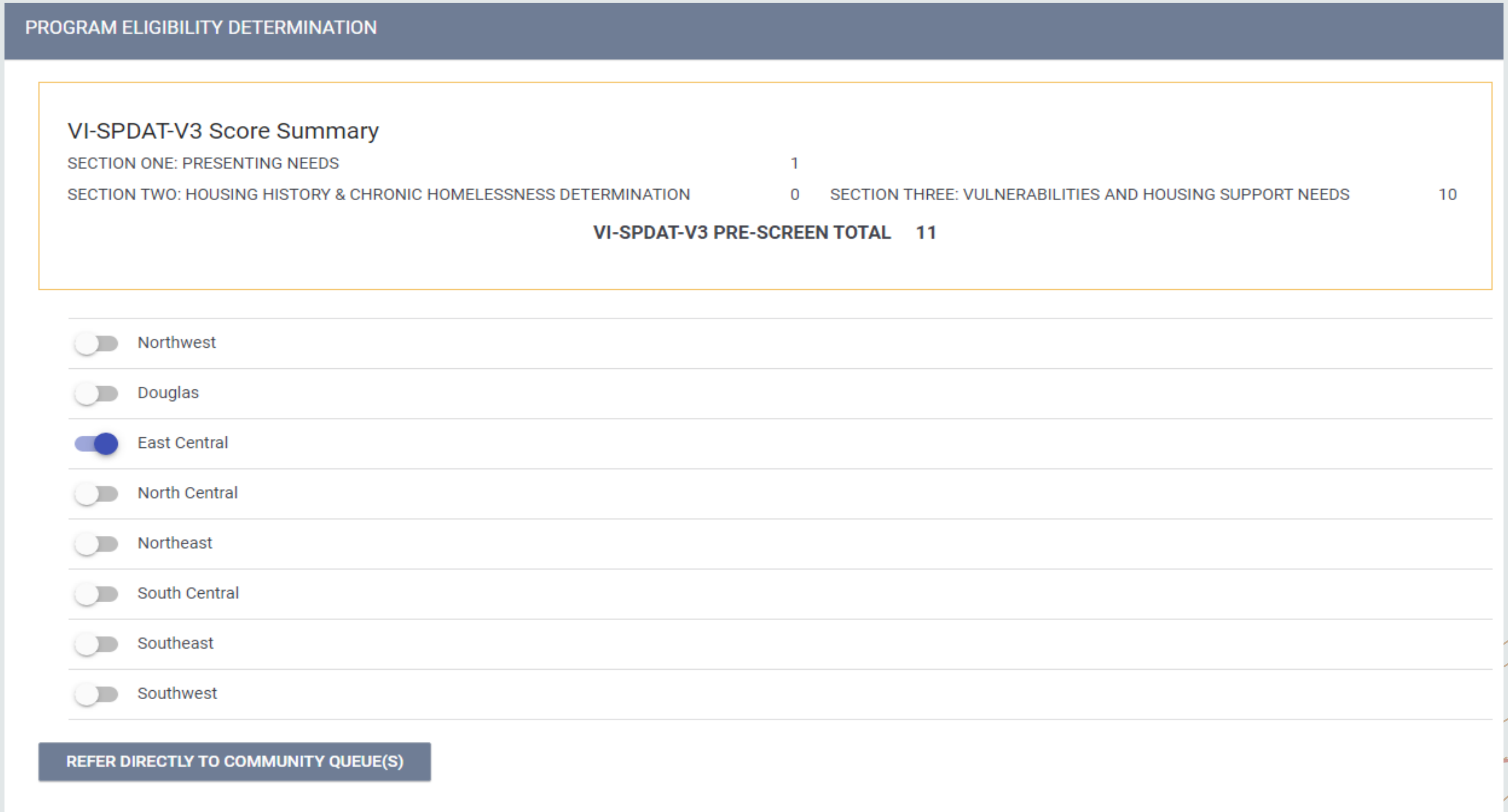
Step Eight:
Enter VI-SPDAT

- On the program menu, select "Assessments" and then click the "Start" button next to the appropriate VI-SPDAT assessment based on your client's household and situation. Answer each of the questions on the selected VI-SPDAT and then click the "Save" button.



Step Nine:
Make Referral to Community Queue

- Under the "Program Eligibility Determination" section, click the slider next to one or more of the regional community queues. Once you're done, click the "Refer Directly to Community Queue(s)" button. On the following screen, enter in any desired notes and then click the "Send Referral" button.



Thanks for participating in this training!

You must complete the survey after you complete this training located at https://www.surveymonkey.com/r/accesstoces prior to receiving access to Coordinated Entry.