

# 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](mailto: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 1<sup>st</sup>, only VI-SPDATs completed on or after February 1<sup>st</sup> should be entered into Clarity.
  - The entry of VI-SPDATs that were completed prior to February 1<sup>st</sup> will be determined by the Coordinated Entry Committee on February 5<sup>th</sup>. 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 receiving 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

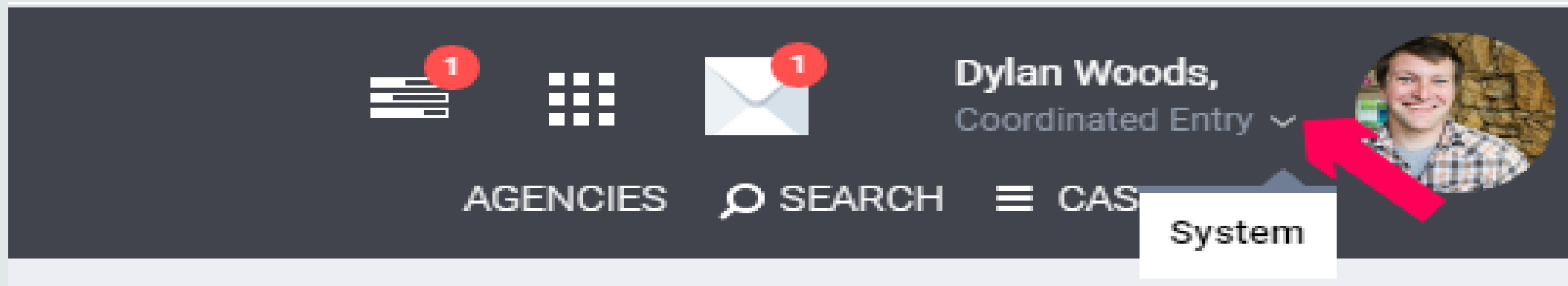
1. Search for or Add Client
2. Enroll client into CES
3. Add Coordinated Entry Event
  - + \*New Requirement from HUD\*
4. Complete Current Living Situation Assessment
  - + \*New Requirement from HUD\*
5. Enter VI-SPDAT
6. Make Referral to Community Queue (aka CES List)
7. *\*Matchmakers Only\** Send 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:

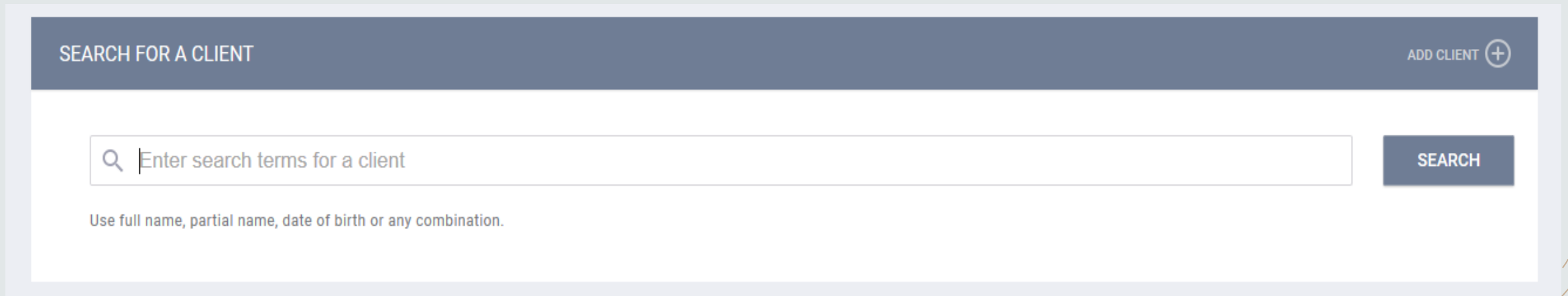
## Switch to the Coordinated Entry “Agency”

- + 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.

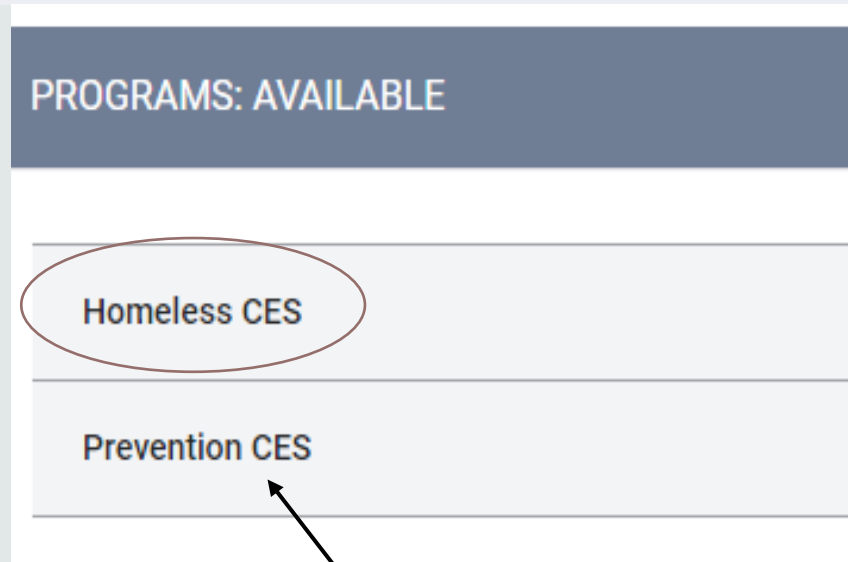
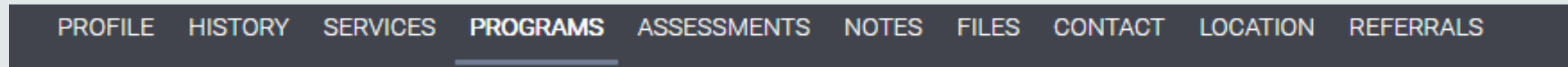
A screenshot of a web application interface for searching clients. At the top, there is a dark blue header bar with the text "SEARCH FOR A CLIENT" on the left and "ADD CLIENT +" on the right. Below the header is a white search area containing a search input field with a magnifying glass icon and the placeholder text "Enter search terms for a client". To the right of the input field is a dark blue "SEARCH" button. Below the input field, there is a small line of text: "Use full name, partial name, date of birth or any combination." The entire interface is set against a light blue background with decorative wavy lines and a white circle in the top left corner.

- + 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.

The screenshot displays a web interface for a program titled "Homeless CES". At the top, a dark blue header reads "PROGRAMS: AVAILABLE". Below this, the program name "Homeless CES" is shown with an upward arrow icon. The interface features two main data visualization cards: "Active Clients" and "Referrals (90 Days)".

**Active Clients:** A circular gauge shows 4 clients. Below the gauge, a legend indicates 0% for Families (represented by a red square) and 100% for Individuals (represented by a blue square).

**Referrals (90 Days):** A circular gauge shows 1 referral. Below the gauge, a legend indicates 0% for Referrals Pending (red square), 0% for Referrals Connected (dark blue square), and 100% for Referrals Denied (light gray square).

At the bottom left, there are two sections: "Funding Source" with a puzzle piece icon, showing "HUD:CoC - Supportive Services Only" and "Availability" showing "Full Availability"; and "Service Categories:" with a checkmark icon, showing "Coordinated Entry Event".

At the bottom center, there is a "PRINT DIRECTIONS" link with a printer icon. At the bottom right, there is a dark blue button labeled "ENROLL", which is highlighted by a red arrow pointing towards it.

# Step Five: Program Enrollment Data

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

The screenshot shows a web application interface for entering program enrollment data. At the top, there is a navigation bar with tabs: Enrollment (selected), History, Provide Services, Assessments, Notes, and Files. Below the navigation bar, the main heading is "Enroll Program for client Test Client".

The form contains several fields:

- Project Start Date:** 12/21/2020 (with a calendar icon)
- PRIOR LIVING SITUATION:**
  - Type of Residence:** Place not meant for habitation (e.g., a vehicle, an abandoned building, bu...
  - Length of Stay in Prior Living Situation:** Data not collected (with a dropdown arrow)
  - Approximate Date Homelessness Started:** / / (with a calendar icon)
  - Number of times on the streets, in ES, or SH in the past three years:** Select (with a dropdown arrow)
  - Total number of months homeless on the streets, in ES, or Safe Haven in the past three years:** Select (with a dropdown arrow)
- DISABLING CONDITIONS AND BARRIERS:**
  - Disabling Condition:** Data not collected (with a dropdown arrow)
  - Victim of Domestic Violence:** Data not collected (with a dropdown arrow)

# 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.

PROGRAM: HOMELESS CES

Enrollment History **Provide Services** Assessments Notes Files × Exit

Services

Coordinated Entry Event Coordinated Entry Event ^

- Referral to scheduled Coordinated Entry Crisis Needs Assessment
- Referral to scheduled Coordinated Entry Housing Needs Assessment
- Referral to Street Outreach project or services

# 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.

PROGRAM: HOMELESS CES

Enrollment History Provide Services **Assessments** Notes Files × Exit

### Assessments

LINK FROM ASSESSMENTS

Current Living Situation	<a href="#">START</a>
Homeless VI-SPDAT for Couples without Children	<a href="#">START</a>
Homeless VI-SPDAT for Families	<a href="#">START</a>
Homeless VI-SPDAT for Single Adults	<a href="#">START</a>

# 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.

PROGRAM: HOMELESS CES

Enrollment History Provide Services **Assessments** Notes Files × Exit

### Assessments

LINK FROM ASSESSMENTS

Current Living Situation	START
Homeless VI-SPDAT for Couples without Children	START
Homeless VI-SPDAT for Families	START
Homeless VI-SPDAT for Single Adults	START

# 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.

PROGRAM ELIGIBILITY DETERMINATION

**VI-SPDAT-V3 Score Summary**

SECTION ONE: PRESENTING NEEDS	1	
SECTION TWO: HOUSING HISTORY & CHRONIC HOMELESSNESS DETERMINATION	0	SECTION THREE: VULNERABILITIES AND HOUSING SUPPORT NEEDS 10

**VI-SPDAT-V3 PRE-SCREEN TOTAL 11**

- Northwest
- Douglas
- East Central
- North Central
- Northeast
- South Central
- Southeast
- Southwest

**REFER DIRECTLY TO COMMUNITY QUEUE(S)**

**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.