

HMIS Monthly Training

Coordinated Entry System (CES)



Agenda

1. What is CES
2. What are the CES Roles
3. CES workflow process in HMIS
 1. Access Point Process
 2. Matchmaker Process
 3. Housing Agency Process

**Questions? Please
use the chat box!**

What is the Coordinated Entry System

It is a method of matching housing opportunities to the most vulnerable homeless population in the community.



CES Options and Lead Agencies

CES Community Options

- Individual CES (ICES) - single adults and youth
- Family CES (FCES) - families with children



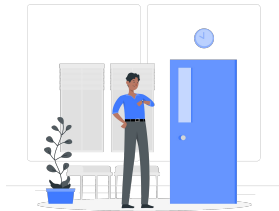
CES Lead Agencies

- County of Orange - Individual
- Families Solutions Collaborative - Families

Coordinated Entry System Roles

Access Points

Connect clients to CES
and offer additional
services



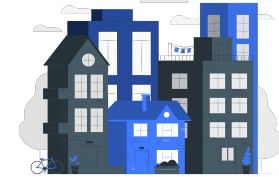
Matchmakers

Refer clients to
housing opportunities



Housing Agencies

Provide housing/
housing search
assistance clients in
CES



The HMIS CES Process with the Bundys



Father - Ed Bundy

Mother - Peg Bundy

Son - Bud Bundy

Daughter - Kelly Bundy



Access Point Process

Example: Married with Children Agency

Search for Client(s) in HMIS

Search for the all the clients records in HMIS

Example: The Bundy Household. HoH: Al Bundy.

The screenshot shows the HMIS search interface for Family Solutions Collaborative. The header includes the organization name, user information (Access Point User), and navigation icons for search, caseload, and referrals. The main search area has a search bar with the text 'Al bun' and a 'SEARCH' button. Below the search bar is a table with one row of results for Al Bundy. To the right of the search area is a sidebar titled 'Your recent client searches:' with a list of names: Peg Bundy, Al Bundy, Bud Bundy, Ned Flanders, and Kelly Bundy.

Family Solutions Collaborative


Access Point User,
Family Solutions Collaborative

SEARCH CASELOAD REFERRALS

SEARCH FOR A CLIENT ADD CLIENT +

Al bun SEARCH

Use full name, partial name, date of birth or any combination.

	Date of Birth	Last Four SSN	Last Updated
 Al Bundy	01/01/1950 Age: 70	0000	12/25/2020

Your recent client searches:

- Peg Bundy
- Al Bundy
- Bud Bundy
- Ned Flanders
- Kelly Bundy

If the clients' profile don't exists in HMIS,
you should create the profile for all the members of the household

Switch to the CES Lead Agency

For families, select:
Families Solutions Collaborative

For individuals, select:
County of Orange

Example: Access Point with the Married with Children Agency

The screenshot shows a web application interface for the 'Married with Children Agency'. At the top, the agency name is displayed on the left, and the user's role 'Access Point User, Married with Children Agency' is on the right. A search bar is located in the top right corner. Below the search bar, a dropdown menu is open, showing two options: 'County of Orange' and 'Family Solutions Collaborative'. A red arrow points to the 'Family Solutions Collaborative' option. The main content area features a search bar with the placeholder text 'Enter search terms for a client' and a 'SEARCH' button. Below the search bar, there is a note: 'Use full name, partial name, date of birth or any combination.' and a warning icon with the text: 'To search a client, please note that you can use any combination of: name (whole or part first or last name), DOB, SS number'. On the right side, there is a section titled 'Your recent client searches' with a list of names: Ned Flanders, Bud Bundy, Kelly Bundy, Peg Bundy, and Bart Simpson. At the bottom left, it says 'Managed with Clarity Human Services'.


Review Clients' Profile

AI Bundy Access Point User, Family Solutions Collaborative S

PROFILE HISTORY PROGRAMS NOTES FILES SERVICES CONTACT SEARCH CASELOAD

CLIENT PROFILE

Social Security Number	XXX - XX - XXXX
Quality of SSN	Data not collected
Last Name	Bundy
First Name	AI
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	01/01/1950
	Adult, Age: 70
Middle Name	Suffix None
Gender	Male
Race	White
Ethnicity	Non-Hispanic/Non-Latino
Veteran Status	No



UNIQUE IDENTIFIER
D6863203B

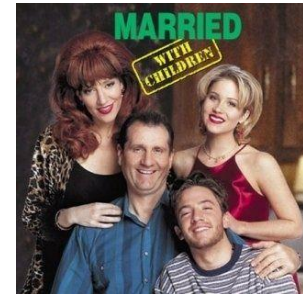
Household Members

Manage

Peg Bundy	Wife
Bud Bundy	Son
Kelly Bundy	Wife

Review all the members' Profile in HMIS.

Make sure all profiles are complete and up-to-date



Complete Contact Information

Al Bundy

PROFILE HISTORY PROGRAMS NOTES FILES SERVICES **CONTACT**

Access Point User, Family Solutions Collaborative

SEARCH CASELOAD

CLIENT CONTACTS

ADD CONTACT +

Household Members Manage

Al Bundy

PROFILE HISTORY PROGRAMS NOTES FILES SERVICES **CONTACT**

Access Point User, Family Solutions Collaborative

SEARCH CASELOAD

ADD CONTACT

Household Members Manage

Peg Bundy Wife

Bud Bundy Son

Kelly Bundy Wife

Contact Type: Client

Email: al_bundy@gmail.com

Phone (#1): 222-222-2222

Phone (#2): XXX-XXX-XXXX

Active Contact:

Private:

Contact Date: 12/23/2020

Note: Mr Bundy is only available by phone in the evenings. During the day he is not able to answer his phone.

SAVE CHANGES CANCEL

Client: Contact Information that belongs to the client

Emergency Contact: Contact Information that belongs to the client's emergency contact

Case Manager: Contact Information that belongs to the client's case manager

Enroll Client(s) in CES Project

For Individuals:
Enroll the client in the
**Individual Coordinated Entry
System Project**

For Families:
Enroll the household in the
**Family Coordinated Entry
System Project**

For Veterans:
Enroll the household in the
project according to the
household type

AI Bundy

PROFILE HISTORY **PROGRAMS** NOTES FILES SERVICES CONTACT

Access Point User
Family Solutions Collaborative

SEARCH CASELOAD

PROGRAM HISTORY

No results found

PROGRAMS: AVAILABLE

Family Coordinated Entry

Household Members

Peg Bundy	Wife
Bud Bundy	Son
Kelly Bundy	Wife

AI Bundy

PROFILE HISTORY **PROGRAMS** NOTES FILES SERVICES CONTACT

Funding Source:
HUD CoC - Supportive Services Only
Availability:
Limited Availability

Service Categories:
✓ Case Management
✓ Coordinated Entry Event

PROGRAM AVAILABILITY:
▶ Available openings 3

Include group members:

Peg Bundy
 Bud Bundy
 Kelly Bundy

PRINT DIRECTIONS

ENROLL

Enroll Client(s) in CES Project (continued)

Al Bundy

PROFILE HISTORY **PROGRAMS** NOTES FILES SERVICES CONTACT



Access Point User,
Family Solutions Collaborative



SEARCH CASELOAD

Enroll Program for client Al Bundy

Project Start Date 12/23/2020

Relationship to Head of Household Self (head of household)

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 90 days or more, but less than one year

Approximate Date Homelessness Started 09/01/2020

Number of times on the streets, in ES, or Safe Haven in the past three years One Time

Total number of months homeless on the streets, in ES, or Safe Haven in the past three years Three Months

DISABLING CONDITIONS AND BARRIERS

Disabling Condition Yes

Physical Disability Yes Long Term Yes

Developmental Disability No

ENROLLING PROGRAM

Program Type: Group (4)

Assigned Staff:

Head of Household: Al Bundy

Program Group Members

Peg Bundy
Kelly Bundy
Bud Bundy

Enroll Client(s) in CES Project (continued)

AI Bundy

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

OC CUSTOM QUESTIONS

What city were you in immediately prior to entry into this project?	Anaheim	▼
Which access point is serving this client?	Married with Children Agency	▼
Which SPA is this household being served in?	North SPA	▼
Does this household have ties to Garden Grove?	<input type="checkbox"/>	
Does this household have ties to Anaheim?	<input checked="" type="checkbox"/>	
Email	al_bundy@gmail.com	
Primary Phone Number	XXX-XXX-XXXX	
Alternate Number	XXX-XXX-XXXX	
Have you or someone in your family ever been legally evicted?	No	▼

Enroll Client(s) in CES Project (continued)

AI Bundy

PROFILE HISTORY **PROGRAMS** NOTES FILES SERVICES CONTACT

Access Point User, Family Solutions Collaborative

SEARCH CASELOAD

PROGRAM: FAMILY COORDINATED ENTRY

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

Program Service History LINK FROM HISTORY

No results found

Managed with Clarity Human Services

2 DAYS ACTIVE PROGRAM

Program Type: Group (4)

Program Start Date: 12/23/2020

Assigned Staff: Access Point User

Head of Household: AI Bundy

Program Group Members

Peg Bundy	12/23/20	Active
Bud Bundy	12/23/20	Active
Kelly Bundy	12/23/20	Active

Status Assessments +

Collect Required CES Documentation

PSH placements required **Chronically Homeless verification** and all placements require **Homeless Verification**

Al Bundy

Access Point User, Family Solutions Collaborative

PROFILE HISTORY PROGRAMS NOTES **FILES** SERVICES CONTACT

SEARCH CASELOAD

UPLOAD A FILE

Category: Coordinated Entry Documentation

Predefined Name: Chronic Homelessness Verification

File: **Chronic Homelessness Verification**
Disability Verification: Disability Check
Disability Verification: Verification from Licensed Professional
Disability Verification: Written verification from the Social Security Administration
Homelessness Verification: Self Certification
Homelessness Verification: Third Party
Other

Select File

Trouble attaching files? Switch to the Basic Uploader

Private:

SAVE CHANGES CANCEL

Household Members

Peg Bundy	Wife
Bud Bundy	Son
Kelly Bundy	Wife

Active Programs

Family Coordinated Entry

Complete the appropriate VI-SPDAT

For Individuals, select:

VI-F-SPDAT Prescreen for Families
[V2] OC Custom assessment

For Families, select:

VI-SPDAT Prescreen for Single Adults
[V2] OC Custom assessment

For Veterans, select:

Veteran Coordinated Entry
Assessment [OC Custom]
assessment.

The screenshot displays the user interface for 'AI Bundy'. At the top, there is a navigation bar with the name 'AI Bundy' and several menu items: PROFILE, HISTORY, PROGRAMS, NOTES, FILES, SERVICES, and CONTACT. Below this, a sub-header indicates the current program: 'PROGRAM: FAMILY COORDINATED ENTRY'. A secondary navigation bar contains 'Enrollment', 'History', 'Provide Services', 'Assessments', 'Notes', 'Files', 'Forms', and an 'Exit' button. The 'Assessments' menu item is highlighted with a red rectangular box. The main content area is titled 'Assessments' and includes a 'LINK FROM ASSESSMENTS' label. It lists seven assessment categories, each with a corresponding 'START' button:

- Current Living Situation
- Status Update Assessment
- Annual Assessment
- Housing Plan: County Staff Only
- VI-F-SPDAT Prescreen for Families [V2] OC Custom
- [OC Custom] Emergency Shelter Bed Reservation Assessment
- [OC Custom] Veteran Assessment

A green arrow points to the 'START' button for the 'VI-F-SPDAT Prescreen for Families [V2] OC Custom' assessment.

Complete the appropriate VI-SPDAT (continued)

AI Bundy

PROFILE HISTORY **PROGRAMS** NOTES FILES SERVICES CONTACT

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

VI-F-SPDAT PRESCREEN FOR FAMILIES [V2] OC CUSTOM

AI Bundy

PROFILE HISTORY **PROGRAMS** NOTES FILES SERVICES CONTACT

To help us serve your family better, we need your picture. May I do so?

OF THE OPPORTUNITIES THE HOUSEHOLD IS ELIGIBLE FOR, WHICH OF THE FOLLOWING HOUSING TYPES IS THE HOUSEHOLD INTERESTED IN?

Transitional Housing

Rapid Re-Housing

Permanent Supportive Housing

Housing Choice Voucher

SAVE CANCEL

At this point, the Bundy household would be considered to be **“Assessed”**

Refer Client(s) to the Community Queue (CQ)

AI Bundy

PROFILE HISTORY **PROGRAMS** NOTES FILES SERVICES CONTACT

PROGRAM: FAMILY COORDINATED ENTRY

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

PROGRAM ELIGIBILITY DETERMINATION

VI-F-SPDAT-V2 Score Summary

GENERAL	2		
HISTORY OF HOUSING & HOMELESSNESS	0	RISKS	0
SOCIALIZATION & DAILY FUNCTION	3	WELLNESS	2
FAMILY UNIT	2		
VI-F-SPDAT-V2 PRE-SCREEN TOTAL		9	

Coordinated Entry System

REFER DIRECTLY TO COMMUNITY QUEUE(S)

Refer Client(s) to the CQ (Continued)

Al Bundy

PROFILE HISTORY PROGRAMS NOTES FILES SERVICES CONTACT

REFERRAL: ADD TO CQ

Send to Queues Coordinated Entry System

Referred Program Community Queue

Referred to Agency Community Queue

Referring Agency Family Solutions Collaborative

Private

B *I*  

This is a note to the Referral Agency: Notes may include:

Housing Preference / Clients Characteristics / Any other information provided during Case Management.]

SEND REFERRAL

CANCEL

At this point, the Bundy household:

- Is **Document Ready**
- Has been added to the Community Queue
- Is waiting to be matched to a housing opportunity

Editing a VI-SPDAT

AI Bundy

PROFILE HISTORY PROGRAMS NOTES FILES SERVICES CONTACT

PROGRAM: FAMILY COORDINATED ENTRY

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

Assessments LINK FROM ASSESSMENTS

Current Living Situation	START
Status Update Assessment	START
Annual Assessment	START
Housing Plan: County Staff Only	START
VI-F-SPDAT Prescreen for Families [v2] OC Custom	START
[OC Custom] Emergency Shelter Bed Reservation Assessment	START
[OC Custom] Veteran Assessment	START

ASSESSMENT HISTORY

Advanced Search Options View ▾

Assessment Name	Completed	Details
<input checked="" type="checkbox"/> VI-F-SPDAT Prescreen for Families [v2] OC Custom Family Solutions Collaborative ⓘ	12/23/2020	VI-F-SPDAT-V2 : 9 ELIGIBILITY

5 DAYS ACTIVE PROGRAM

Program Type: Group (4)

Program Start Date: 12/23/2020

Assigned Staff: Access Point User

Head of Household: AI Bundy

Program Group Members

Peg Bundy	12/23/20	Active
Bud Bundy	12/23/20	Active
Kelly Bundy	12/23/20	Active

Status Assessments + Add

No statuses

Assessment due every year
Notification: OFF

Keep the Client Active in the Community Queue

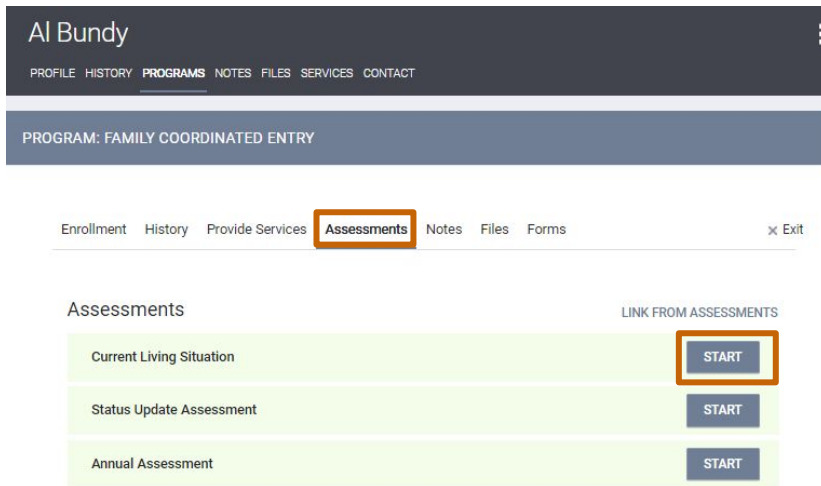
Case Managers should keep the clients Active in the Community Queue by:

- Update the Current Living Situation
- Check-In with client
- Add a Client Note
- Add a CES Event



Add Current Living Situation

Capture the client's Current Living Situation at the time of contact



AI Bundy

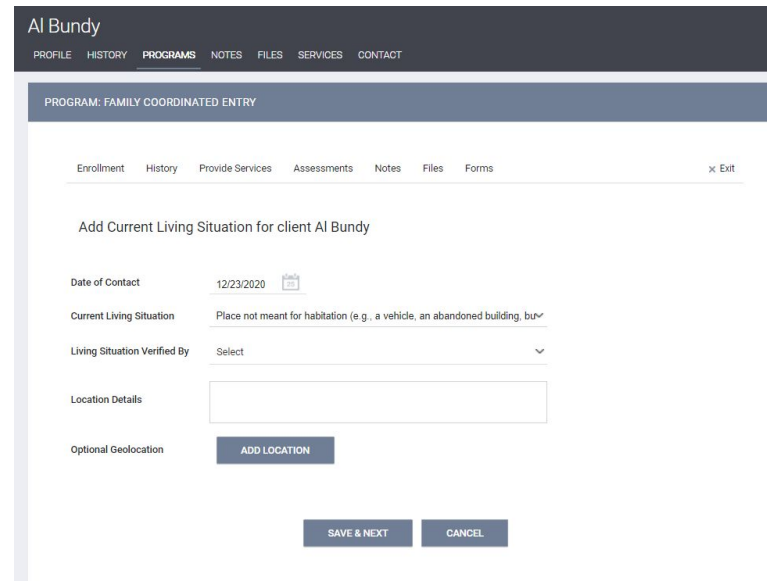
PROFILE HISTORY **PROGRAMS** NOTES FILES SERVICES CONTACT

PROGRAM: FAMILY COORDINATED ENTRY

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

Assessments LINK FROM ASSESSMENTS

Current Living Situation	START
Status Update Assessment	START
Annual Assessment	START




AI Bundy

PROFILE HISTORY **PROGRAMS** NOTES FILES SERVICES CONTACT

PROGRAM: FAMILY COORDINATED ENTRY

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

Add Current Living Situation for client AI Bundy

Date of Contact 12/23/2020 

Current Living Situation Place not meant for habitation (e.g., a vehicle, an abandoned building, bu-

Living Situation Verified By Select ▼

Location Details

Optional Geolocation **ADD LOCATION**

SAVE & NEXT **CANCEL**

Check-In Button


Open the referral in the HoH's History Page

AI Bundy

PROFILE **HISTORY** PROGRAMS NOTES FILES SERVICES CONTACT

HISTORY

Advanced Search Options View ▾

Service Name	Start Date
 Referral: Springfield RRH Project Family Solutions Collaborative referral to A Springfield Agency	12/28/2020

Click the Check-In button

REFERRAL: EDIT

REFERRAL: ASSIGN

Client	AI Bundy
Referred to	Community Queue - Coordinated Entry System
Referring Agency	Family Solutions Collaborative
Referred Date	12/23/2020
Days Pending	0 day(s)
Qualified	Yes
VI-F-SPDAT-V2 score	9
Last Activity	12/23/2020 CHECK-IN
Referred by Staff	Access Point User ⓘ
Private	<input type="checkbox"/>

SAVE CHANGES CANCEL

Add Notes

Case Managers can add notes regarding
the clients' Housing Needs

Enter Note, and click "Send Note"

REFERRAL: EDIT

NOTES

S

↳ Reply from Access Point User @ Family Solutions Collaborative



This is a note to the Referral Agency. Notes may include:

Housing Preference / Clients Characteristics / Any other information provided during Case Management.

B

I

☰

☰

Case managers can add and respond to notes regarding the household's housing needs on the Community Queue Referral page by entering the note and clicking on the *Send Note* button

SEND NOTE

Add a CES Event

CES Events are tracked as services under the CES Project Enrollment

AI Bundy
PROFILE HISTORY **PROGRAMS** NOTES FILES SERVICES CONTACT

PROGRAM: FAMILY COORDINATED ENTRY

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

Services

Coordinated Entry Event Coordinated Entry Event ^

- Problem Solving/Diversion/Rapid Resolution intervention or service
- Referral to Housing Navigation project or services
- Referral to Non-continuum services: Ineligible for continuum services
- Referral to Non-continuum services: No availability in continuum services
- Referral to post-placement/follow-up case management
- Referral to Prevention Assistance Project
- Referral to scheduled Coordinated Entry Crisis Needs Assessment
- Referral to scheduled Coordinated Entry Housing Needs Assessment
- Referral to Street Outreach project or services

CES events capture key referral and placement events, as well as the results of these events

AI Bundy
PROFILE HISTORY **PROGRAMS** NOTES FILES SERVICES CONTACT

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

Services

Coordinated Entry Event Coordinated Entry Event ^

Problem Solving/Diversion/Rapid Resolution intervention or service ^

Start Date: 12/30/2020 End Date: 12/30/2020

Result: Client housed/re-housed in a safe alternative: -- Select --

Include group members:

- Peg Bundy
- Bud Bundy
- Kelly Bundy

Service Note

B I **B** **I**

SUBMIT

Remove Client(s) from the Community Queue



If the client no longer needs to be served through CES

Clients should be exited from the CES Project when removed from the Community Queue

The screenshot shows a web application interface for a client profile. The header includes the name 'Al Bundy' and navigation links: PROFILE, HISTORY, PROGRAMS, NOTES, FILES, SERVICES, CONTACT. On the right, there are icons for a grid, a calendar, and a shield, along with the text 'Access Point Use: Home Services Collaborative' and a search bar. The main content area is titled 'CLIENT PROFILE' and contains a form with the following fields:

Social Security Number	XXX-XX-XXXX
Quality of SSN	Data not collected
Last Name	Bundy
First Name	Al
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	01/01/1950
Middle Name	
Gender	Male
Race	White
Ethnicity	Non-Hispanic/Non-Latino
Veteran Status	No

Additional information includes 'Adult Age: 70', 'Suffix: None', and a photo of a man with the text 'UNIQUE IDENTIFIER D6863203B'. On the right side, there is a 'Household Members' section with a 'Manage' button and a list of family members:

Peg Bundy	Wife
Bud Bundy	Son
Kelly Bundy	Wife

Remove Client(s) from the Community Queue

If the client no longer needs to be served through CES

Clients should be exited from the CES Project when removed from the Community Queue

REMOVE FROM QUEUE

Reason for Removal

Self Resolved



Permanently Living with Family/Friends



Queue Removal Date

12/23/2020



SAVE CHANGES

CANCEL

Let's recap the Access Point Process!



Access Point Case Manager (Married with Children Agency):

- Located and reviewed Client Profiles in HMIS
- Enrolled Clients in Family CES Project
- Collected Required CES Documentation
- Completed appropriate CES Assessment (Family VI-SPDAT)
- Referred client to the Community Queue (CQ)
- Kept the clients active on the CQ

Mr. Bundy is assessed, document ready, on the community queue and is ready to be matched!



Matchmaker Process

CES Lead Agency:

- Family Solutions Collaborative
- County of Orange

Matching Process (CES Lead Agency)

The matchmaker matches the most vulnerable clients/households with
Housing Opportunities

Only the **CES Lead Agency** completes matches in CES

**Family Solutions
Collaborative (Families)**

**County of Orange
(Individuals and Veterans)**

They review:

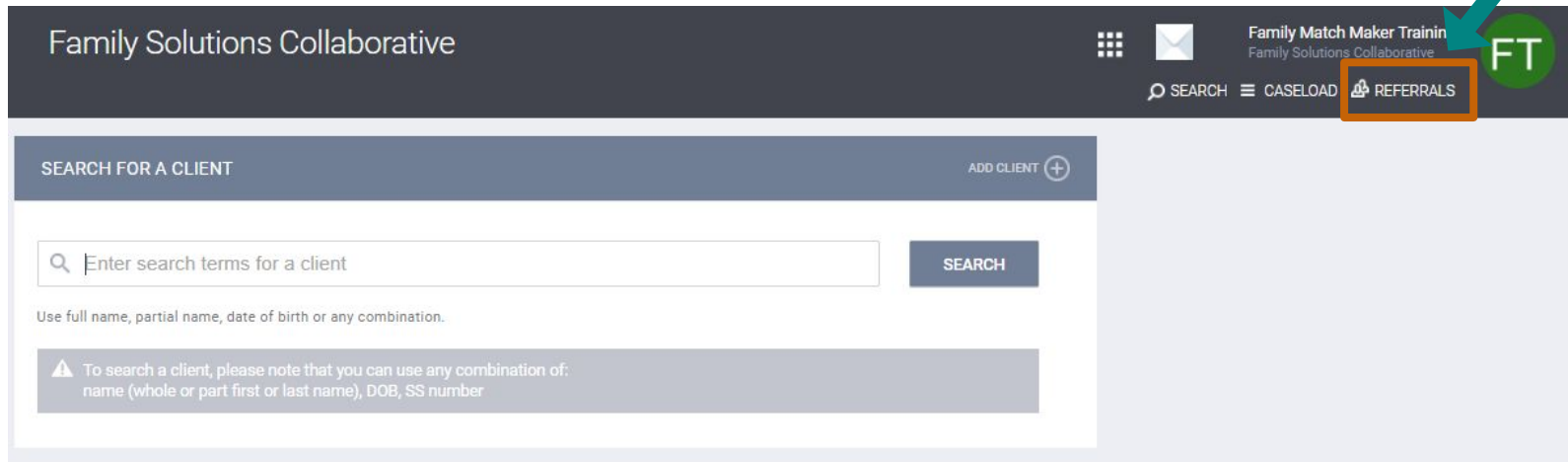
- Clients on the Community Queue Report
- Available Housing Opportunities Report

They considered:

Approximate Date Homelessness Started, Days Since Referral Added to Queue, Assessment Score, Chronic Homeless at PIT/Current Date

Match a client/household to a Housing Opportunity

How is a client matched to a housing opportunity in HMIS?
Example: Match The Bundys with a Housing Opportunity



The screenshot displays the user interface for the Family Solutions Collaborative. At the top, the header includes the organization name, navigation icons, and the user's role, "Family Match Maker Trainee". The "REFERRALS" menu item is highlighted with an orange box, and a teal arrow points to it. Below the header is a search bar for clients, with a search button and a search instruction: "Use full name, partial name, date of birth or any combination." A warning message is also present: "To search a client, please note that you can use any combination of: name (whole or part first or last name), DOB, SS number".

Family Solutions Collaborative

Family Match Maker Trainee
Family Solutions Collaborative

SEARCH CASELOAD REFERRALS FT

SEARCH FOR A CLIENT ADD CLIENT +

Enter search terms for a client SEARCH

Use full name, partial name, date of birth or any combination.

To search a client, please note that you can use any combination of:
name (whole or part first or last name), DOB, SS number

Match a client/household to a Housing Opportunity

Community Queue Tab

REFERRALS

Pending **Community Queue** Analysis Completed Denied Sent Availability

Community Queue

Coordinated Entry System Emergency Shelter Bed Reservation

Search

Active Agency A Springfield Agency

Project Springfield RRH Project

Eligible Clients Only



Mode VI-F-SPDAT Prescreen for Families [v2]

Characteristic -- Select --

Score Range -- All Ranges --

Sort By Default

SEARCH

Client	Referral Date	Days Pending	
 Al Bundy Referred by: Family Solutions Collaborative ⓘ	12/23/2020	0	
Joe Shmoe Referred by: OC Training Agency	12/23/2020	3	

Active Agency: Select the agency with the housing Opportunity

Project: Select the Project with the housing opportunity

Mode: Select the Prioritization Assessment

- **Individuals: VI-SPDAT Prescreen for Single Adults [v2]**
- **Families: VI-F-SPDAT Prescreen for Families [v2]**
- **Veterans: Veteran Coordinated Entry Assessment**

Sort By: Should be set to default (sorts by score)
Enable the Eligible Clients Only toggle

Click on Search

The resulting list will include all clients eligible for the project sorted by score

Click the Edit icon next to the client to match

Match a client/household to a Housing Opportunity

REFERRAL: ASSIGN

Client Al Bundy

Referred to Community Queue - Coordinated Entry System

Referring Agency Family Solutions Collaborative

Referred Date 12/23/2020

Days Pending 0 day(s)

Qualified Yes

VI-F-SPDAT-V2 score 9

Last Activity 12/23/2020

Referred by Staff Access Point User ⓘ

Private

RE-ASSIGN

Program Springfield RRH Project ▾

Opening 12/01/2020 Unit is on the third floor ▾

Edit Referral Screen Re-assign Section:

Select the project the client is being refer to

Select the Opening the client is being refer to

Save Changes

Client has been matched to a housing opportunity and will no longer appear on the queue

Let's recap the Matchmaker Process!



Matchmaker (Family CES Lead Agency):

- Reviewed the Households in the Community Queue Report and the Available Housing Opportunities Report
- Reviewed Mr Bundy's referral in HMIS
- Matched Mr Bundy to a Housing Opportunity in the Springfield RRH Project in HMIS

Mr. Bundy has been referred to a Housing opportunity!



Housing Agencies Process

Example: A Springfield Agency

Add Housing Opportunities Availability Tab

Housing Agencies are responsible for adding and updating their projects' housing opportunities

Example: Agency Admin with "A Springfield Agency"

The screenshot displays the user interface for a housing agency. At the top, the header includes the agency name, user information, and navigation links. The main content area shows a list of projects with their availability status. The 'Springfield RRH Project' is highlighted, and its 'LIMITED AVAILABILITY' status is selected. Below the project list, there are buttons to add single or multiple openings.

A Springfield Agency

Housing Agency User, A Springfield Agency

DASHBOARD SEARCH CASELOAD REFERRALS

Pending Community Queue Analysis Completed Denied Sent **Availability**

Program Availability

Bed Reservation Coordinated Entry System

Project Name	Full Availability	Limited Availability	No Availability
Evergreen Street Outreach Project	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
HOPWA Springfield	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
Linda's Test	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
Short Term Supportive Housing	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
Springfield Homeless Shelter	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
Springfield RRH Project	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY

There are no available openings
There are no reserved openings

ADD SINGLE OPENING ADD MULTIPLE OPENINGS

There are no results

Add Housing Opportunities

Add an Opening

A Springfield Agency

DASHBOARD SEARCH

Pending Community Queue

Program Availability

Evergreen Street Outreach Project

HOPWA Springfield

Linda's Test

Short Term Supportive Housing

Springfield Homeless Shelter

Springfield PHS Project

There are no available openings

There are no reserved openings

ADD AN OPENING

Date: 12/21/2020

Additional Notes: Unit is upstairs

Household must have Child under age 6:

City preference:

Opportunity is for Family CES:

Maximum size of household that can occupy unit: 4

Opportunity is for Individual CES:

SAVE CHANGES CANCEL

Add Housing Opportunities Edit an Opening

A Springfield Agency

Pending Community Queue Analysis Completed Denied Sent **Availability**


Program Availability

Evergreen Street Outreach Project	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
HOPWA Springfield	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
Linda's Test	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
Short Term Supportive Housing	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
Springfield Homeless Shelter	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
Springfield PHS Project	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
Springfield RRH Project	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY

AVAILABLE OPENINGS

12/01/2020

Household must have Child under age 6 : No
Opportunity is for Family CES : Yes
Maximum size of household that can occupy unit : 6
Opportunity is for Individual CES : Yes

 Modify Opening

A Springfield Agency

DASH-BOARD SEARCH

Program Availability

MODIFY OPENING

Date: 12/01/2020

Additional Notes:

Household must have Child under age 6:

City preference:

Opportunity is for Family CES:

Maximum size of household that can occupy unit: 4

Opportunity is for Individual CES:

AVAILABLE OPENINGS

12/01/2020

Household must have Child under age 6 : No
Opportunity is for Family CES : Yes
Maximum size of household that can occupy unit : 6
Opportunity is for Individual CES : Yes

Review Clients Match Email Notification

Agency Admin at the Housing
Agency receive Email notification:
Pending Referral.

New Referral on Orange County Training System Inbox x



Orange County Training System <alert@notifications.clarityhumanservices.com>
to me ▾

6:11 PM (2 minutes ago) ☆ ↶ ⋮



Dear Housing Agency User,

Family Match Maker Training has referred a client with the unique identifier D37D3F001 to program: Springfield PHS Project.

Please follow this [link](#) to view the new pending referral.

Orange County Training System Team

Questions? Visit our online wiki: get.clarityhs.help



Review Pending Tab

A Springfield Agency

Housing Agency User, A Springfield Agency

DASHBOARD SEARCH CASELOAD **REFERRALS**

REFERRALS

Community Queue Analysis Completed Denied Sent Availability


Pending

Pending Referrals


Search _____ Mode Standard

Sort By Default Characteristic -- Select --

Eligible Clients Only **SEARCH**

Client	Referral Date	Qualified	Days Pending
 Al Bundy Program: Springfield RRH Project Referred by: Family Solutions Collaborative	12/28/2020	Reassigned	0 total 0 pending

Last 30 days



1

Pending

Reviewing and Accepting a Referral

Edit Referral Screen

Change Status from Pending to Pending - in Process

Review the Referral

- Clients Eligibility
- Clients still interested in being housed through the project

A Springfield Agency

Housing Agency User, A Springfield Agency

DASHBOARD SEARCH CASELOAD REFERRALS

REFERRAL: EDIT

Client	Al Bundy
Referred Program	Springfield RRH Project
Referred Program Opening	12/01/2020
Referred to Agency	A Springfield Agency
Referring Agency	Family Solutions Collaborative
Referred Date	12/28/2020 11:43 AM
Days Pending	0 day(s)
In Process	0 day(s)
Qualified	Reassigned
VI-F-SPDAT-V2 score	9
Referred by Staff	Family Match Maker Training
Case Manager	Housing Agency User
Last Activity	12/28/2020 CHECK-IN
Status	Pending
Private	

SAVE CHANGES CANCEL

1

Pending

Pending
Pending - In Process
Denied
Expired


Reviewing and Accepting a Referral (continued)

Edit Referral Screen


Review Notes regarding the referral

Review History of the referral



NOTES

S ↳ Reply from Access Point User @ Family Solutions Collaborative Dec 28, 2020 at 11:43 AM 

This is a note to the Referral Agency


FT ↳ Reply from Family Match Maker Training @ Family Solutions Collaborative Dec 28, 2020 at 12:11 PM 

Al Bundy and all the Bundys have been matched to the Springfield RRH Project

B **I**  

SEND NOTE

HISTORY

Activity	Date	Days Pending	Staff
Program Referral: Springfield RRH Project, A Springfield Agency	12/28/2020 2020-12-28 12:15:12	0	Family Match Maker Training Family Solutions Collaborative
Added to Community Queue: Coordinated Entry System	12/28/2020 2020-12-28 11:43:42	0	Access Point User Family Solutions Collaborative 

Enroll Clients in the Housing Project

Navigate to the HoH's Programs Page (top menu of Client Record)
Locate project the clients were referred to

The screenshot displays a user interface for a client record. At the top, the client's name 'AI Bundy' is shown, along with navigation tabs: PROFILE, HISTORY, PROGRAMS (highlighted with an orange box), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, REFERRALS, and SERVICES. The right side of the header includes the user's role 'Housing Agency User, A Springfield Agency' and a logo 'HU'. Below the header, the 'PROGRAM HISTORY' section contains a table with the following data:

Program Name	Start Date	End Date	Type
Family Coordinated Entry Coordinated Entry Family Solutions Collaborative	12/23/2020	Active	Group

Below the program history, the 'PROGRAMS: AVAILABLE' section lists three options, with the last one highlighted by an orange box:

- Springfield Homeless Shelter
- Springfield PHS Project
- Springfield RRH Project

On the right side of the interface, there are sections for 'Household Members' (listing Peg Bundy, Bud Bundy, and Kelly Bundy), 'Active Programs' (listing Family Coordinated Entry), and 'Assigned Staff' (with a count of 2). At the bottom right, there are two circular icons labeled 'S' and 'HU'.

Enroll Clients in the Housing Project (continued)

Select the “Program Placement Referral Provided..” toggle

For families, select all the household members

The screenshot displays a user interface for managing client enrollment in a housing project. At the top, the user's name 'Al Bundy' is shown, along with navigation tabs for PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, REFERRALS, and SERVICES. The main content area is titled 'Springfield RRH Project' and features two summary cards: 'Active Clients' with a count of 4 and 'Referrals (90 Days)' with a count of 1. Below these are sections for 'Funding Source' (Local or Other Funding Source) and 'Availability' (Limited Availability). A 'Service Categories' section includes 'Financial' and 'Case Management'. A 'PROGRAM AVAILABILITY:' section shows 'Available openings' with a count of 5. A red notification box indicates '1 pending referral(s). Oldest 1 days.' with a green arrow pointing to it. A toggle switch for 'Program Placement a result of Referral provided by 159' is highlighted with an orange box. An 'Include group members:' section lists 'Peg Bundy', 'Bud Bundy', and 'Kelly Bundy', each with a toggle switch. At the bottom, there are 'PRINT DIRECTIONS' and 'ENROLL' buttons.

Enrollment in the Housing Project

Answer the enrollment questions for all members of the household

Project Start Date =
The date the household was accepted in the project

The screenshot shows a web application interface for enrolling a client named Al Bundy. The interface is divided into a main content area and a right-hand sidebar. The main content area is titled "Enroll Program for client Al Bundy" and contains several form fields for client information and living situation. The right-hand sidebar is titled "ENROLLING PROGRAM" and contains fields for program type, assigned staff, and head of household. Below this, there is a section for "Program Group Members" listing three members: Peg Bundy, Kelly Bundy, and Bud Bundy. The top navigation bar includes a profile section for "Al Bundy" and a menu with options like PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, REFERRALS, and SERVICES. The top right corner shows the user's role as "Housing Agency User, A Springfield Agency" and a logo for "HU".

Al Bundy

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

DASHBOARD SEARCH CASELOAD

Housing Agency User, A Springfield Agency HU

Enroll Program for client Al Bundy

Project Start Date 12/28/2020

Relationship to Head of Household Self (head of household)

Is the Client an Adult or Head of Household? Yes (Automatically Generated Response)

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 90 days or more, but less than one year

Approximate Date Homelessness Started 09/01/2020

Number of times on the streets, in ES, or Safe Haven in the past three years One Time

Total number of months homeless on the streets, in ES, or Safe Haven in the past three years Three Months

ENROLLING PROGRAM

Program Type: Group (4)

Assigned Staff:

Head of Household: Al Bundy

Program Group Members

Peg Bundy
Kelly Bundy
Bud Bundy

Completed Referral

The client is now in the Completed Tab

The screenshot displays a web application interface for 'A Springfield Agency'. The top navigation bar includes the agency name, user information ('Housing Agency User, A Springfield Agency'), and navigation links for 'DASHBOARD', 'SEARCH', 'CASELOAD', and 'REFERRALS'. The 'REFERRALS' tab is active, and the 'Completed' filter is selected and highlighted with an orange box. The main content area shows a list of 'Completed Referrals' with search and filter options. A donut chart on the right indicates 1 completed referral.

A Springfield Agency

Housing Agency User, A Springfield Agency

DASHBOARD SEARCH CASELOAD **REFERRALS**

REFERRALS

Pending Community Queue Analysis **Completed** Denied Sent Availability

Completed Referrals

Search _____ Mode Standard

Sort By Default Characteristic -- Select --

SEARCH

Client	Referred Program
Al Bundy Referred by: Family Solutions Collaborative Created at 12/28/2020 Connected at 12/28/2020	Springfield RRH Project A Springfield Agency

Last 30 days

1

Completed

Exit clients from the CES Enrollment

Navigate to the HoH's Programs Page, and locate the Enrollment in the CES Project

The screenshot displays a user profile for 'Al Bundy' with the 'PROGRAMS' tab selected. The 'PROGRAM HISTORY' table contains the following data:

Program Name	Start Date	End Date	Type
Springfield RRH Project Services Only A Springfield Agency	12/28/2020	Active	Group
Family Coordinated Entry Coordinated Entry Family Solutions Collaborative	12/23/2020	Active	Group

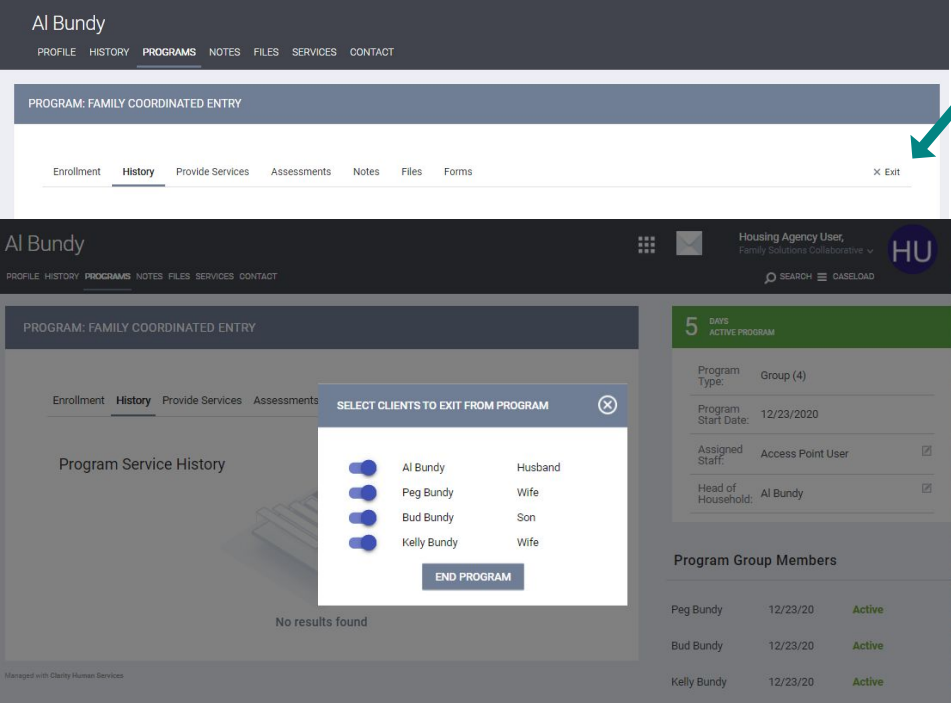
The 'Family Coordinated Entry' program is highlighted with a red box. To the right, the 'Household Members' section includes a 'Manage' button and a list of family members:

- Peg Bundy (Wife)
- Bud Bundy (Son)
- Kelly Bundy (Wife)

The 'Active Programs' section is also visible at the bottom right.

Exit clients from the CES Enrollment (continued)

Navigate to the Exit Tab
and Exit All members of the
Household



The screenshot displays the CES Enrollment interface for a household named 'Al Bundy'. The top navigation bar includes 'PROFILE', 'HISTORY', 'PROGRAMS', 'NOTES', 'FILES', 'SERVICES', and 'CONTACT'. The main content area shows the 'PROGRAM: FAMILY COORDINATED ENTRY' with tabs for 'Enrollment', 'History', 'Provide Services', 'Assessments', 'Notes', 'Files', and 'Forms'. A green arrow points to the 'X Exit' button in the top right corner of the program header.

The second screenshot shows the 'Exit' modal open, titled 'SELECT CLIENTS TO EXIT FROM PROGRAM'. The modal lists four household members with toggle switches:

Client Name	Relationship	Status
Al Bundy	Husband	<input checked="" type="checkbox"/>
Peg Bundy	Wife	<input checked="" type="checkbox"/>
Bud Bundy	Son	<input checked="" type="checkbox"/>
Kelly Bundy	Wife	<input checked="" type="checkbox"/>

An 'END PROGRAM' button is located at the bottom of the modal. The background interface shows the 'Program Service History' section with 'No results found' and a sidebar with program details and a list of 'Program Group Members' (Peg Bundy, Bud Bundy, Kelly Bundy) all marked as 'Active'.

Exit clients from the CES Enrollment (continued)

Answer all the Project Exit Questions

Exit Date = Start Date in the Housing Project

Destination Field should match the type of housing in which the clients were enrolled

AI Bundy

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

PROGRAM: FAMILY COORDINATED ENTRY

Enrollment History Assessments Notes Files Forms × Exit

End Program for client AI Bundy

Project Exit Date	12/28/2020 12/28
Destination	Rental by client, with RRH or equivalent subsidy ▼

DISABLING CONDITIONS AND BARRIERS


Physical Disability	Yes ▼	Long Term	Yes ▼
Developmental Disability	No ▼		
Chronic Health Condition	No ▼		
HIV - AIDS	No ▼		
Mental Health Problem	No ▼		
Substance Abuse Problem	No ▼		

History of a Successful Referral

Al Bundy

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

Advanced Search Options [View](#) 

Service Name	Start Date	End Date
 Referral: Springfield RRH Project Family Solutions Collaborative referral to A Springfield Agency	12/28/2020	12/28/2020

HISTORY

Activity	Date	Days Pending	Staff
 Enrolled: Springfield RRH Project, A Springfield Agency	12/28/2020 2020-12-28 12:56:28	0	Housing Agency User A Springfield Agency
 In Process: Springfield RRH Project, A Springfield Agency	12/28/2020 2020-12-28 12:31:15	0	Housing Agency User A Springfield Agency
 Program Referral: Springfield RRH Project, A Springfield Agency	12/28/2020 2020-12-28 12:15:12	0	Family Match Maker Training Family Solutions Collaborative
 Added to Community Queue: Coordinated Entry System	12/28/2020 2020-12-28 11:43:42	0	Access Point User Family Solutions Collaborative 

Denying a Referral

Edit Referral Screen

Change Status from Pending to Denied

Specify if the client should be send back to the community queue or not

Specify who is denying the referral

Enter denied reason

Denial Information Note

“Save Changes”

A Springfield Agency

VI-F-SPDAT-V2 score	8
Referred by Staff	Family Match Maker Training
Case Manager	Housing Agency User
Last Activity	12/28/2020 CHECK-IN
Status	Denied
Send to Community Queue	Yes
Denied By Type	Provider
Denied Reason	Lack of Eligibility
Denial Information	Mr. Bundy is not CH therefore the Bundy Household is not eligible for this project.
Private	<input type="checkbox"/>

SAVE CHANGES CANCEL

Denying a Referral

After the Household's referral is denied, the HoH will be on the Denied Tab and the Community Queue Tab

A Springfield Agency

Housing Agency User, A Springfield Agency

DASHBOARD SEARCH CASELOAD REFERRALS

REFERRALS

Pending Community Queue Analysis Completed **Denied** Sent Availability

Denied Referrals


Search _____ Mode Standard

Sort By Default Characteristic -- Select --

SEARCH

Client	Referred Program
Moira Rose Referred by: Family Solutions Collaborative Created at: 12/28/2020	Family Solutions Collaborative Resigned

Last 30 days



1 Completed
1 Denied

A Springfield Agency

Housing Agency User, A Springfield Agency

DASHBOARD SEARCH CASELOAD REFERRALS

REFERRALS

Pending **Community Queue** Analysis Completed Denied Sent Availability

Community Queue

Coordinated Entry System Emergency Shelter Bed Reservation

Search moira Mode Standard

Characteristic -- Select --


Eligible Clients Only

Sort By Default

SEARCH

Client	Referral Date	Days Pending
Moira Rose Referred by: Family Solutions Collaborative	12/28/2020	0

Last 30 days



14 Pending

Tabs in the Referrals Page

A Springfield Agency

Housing Agency User,
A Springfield Agency

DASHBOARD SEARCH CASELOAD REFERRALS

REFERRALS

Pending Community Queue Analysis Completed **Denied** Sent Availability

Last 3

Pending Tab:

- clients that have been matched to a housing opportunity at an agency

Community Queue Tab:

- clients that are currently on the queue, waiting to be matched to a housing opportunity

Completed Tab:

- clients that were matched through a CES referral, have accepted the housing opportunity, and were enrolled in the housing project at an agency

Denied Tab:

- clients that were matched to a housing opportunity at an agency, but were ultimately denied by the household or the agency

Availability Tab:

- List the housing opportunities of projects

Let's recap the Housing Agency Process!



Agency Admin (A Springfield Agency):

- Added a housing Opportunity in the Springfield RRH Project
- Received a referral from the Matchmaker to house Mr Bundy in the Springfield RRH Project
- Reviewed the Referral
 - Checked Client Eligibility
 - Confirmed Mr Bundy is still interested in being housed in my project
- Enrolled the Bundys in the Springfield RRH project
- Exited the Bundys from the Family CES Project

The Bundys have been Housed, yay!

Thank you!

We encourage you to review all the CES Documentation Available
([Knowledge Base articles](#), [flowcharts](#), [HMIS CES Training](#))

If you have general questions please let us know in the chat box, or submit a ticket to the HMIS Help Desk.