HMIS Monthly Training

Coordinated Entry System (CES)

Illustration by Stories by Freepik

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

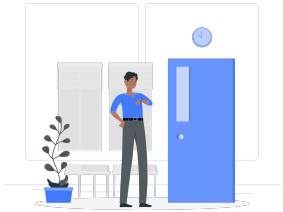
CES Lead Agencies

- 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

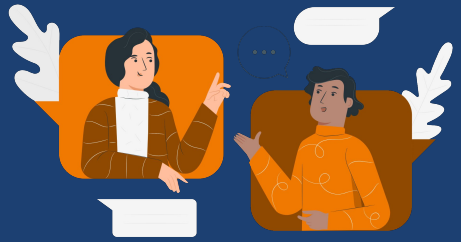
The HMIS CES Process with the Bundys

Father - Ed Bundy

Mother - Peg Bundy

Son - Bud Bundy

Daughter - Kelly Bundy

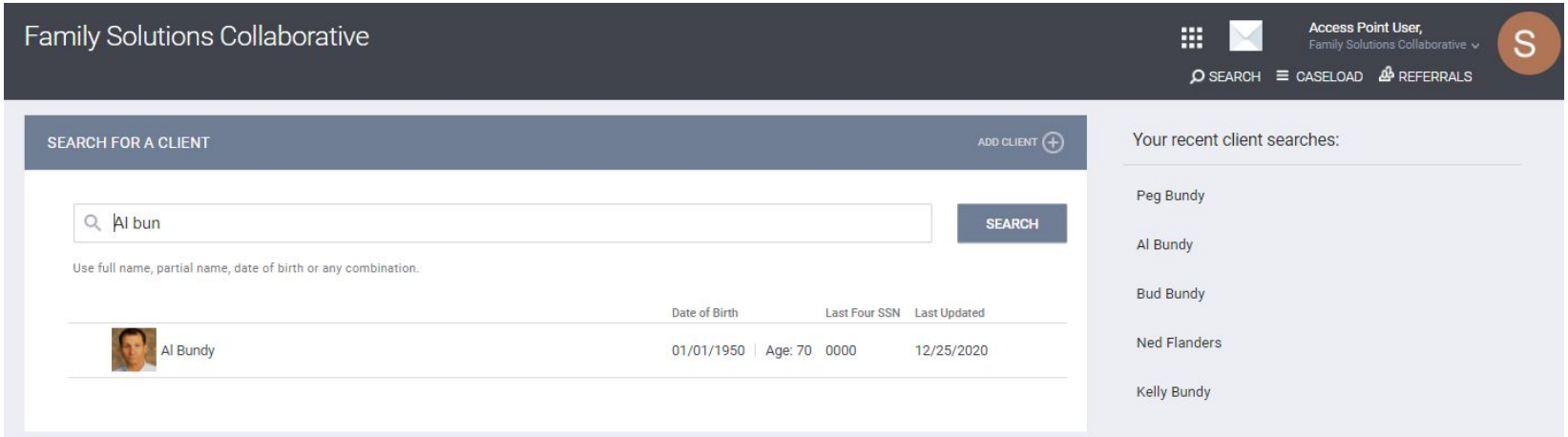


Access Point Process

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.



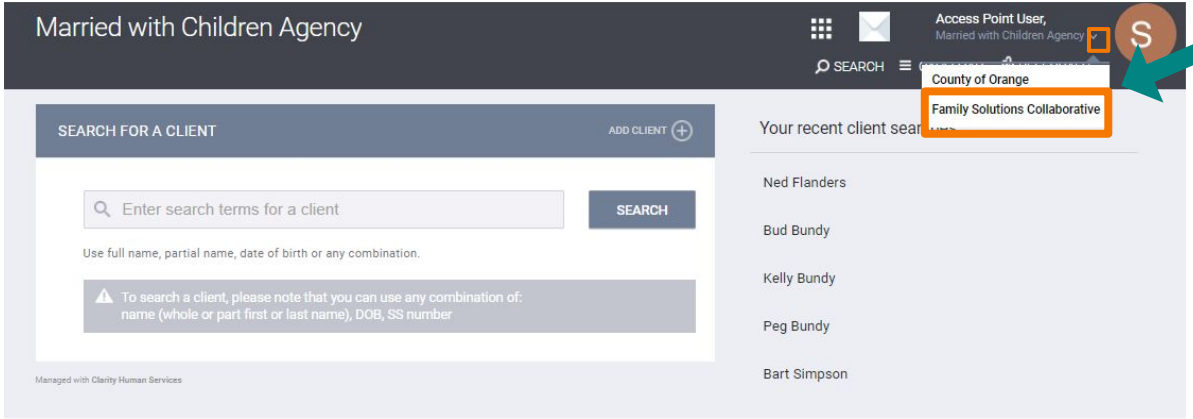
If the clients' profile don't exits in HMIS,
you should create the profile for all the members of the household

Switch to the CES Lead Agency

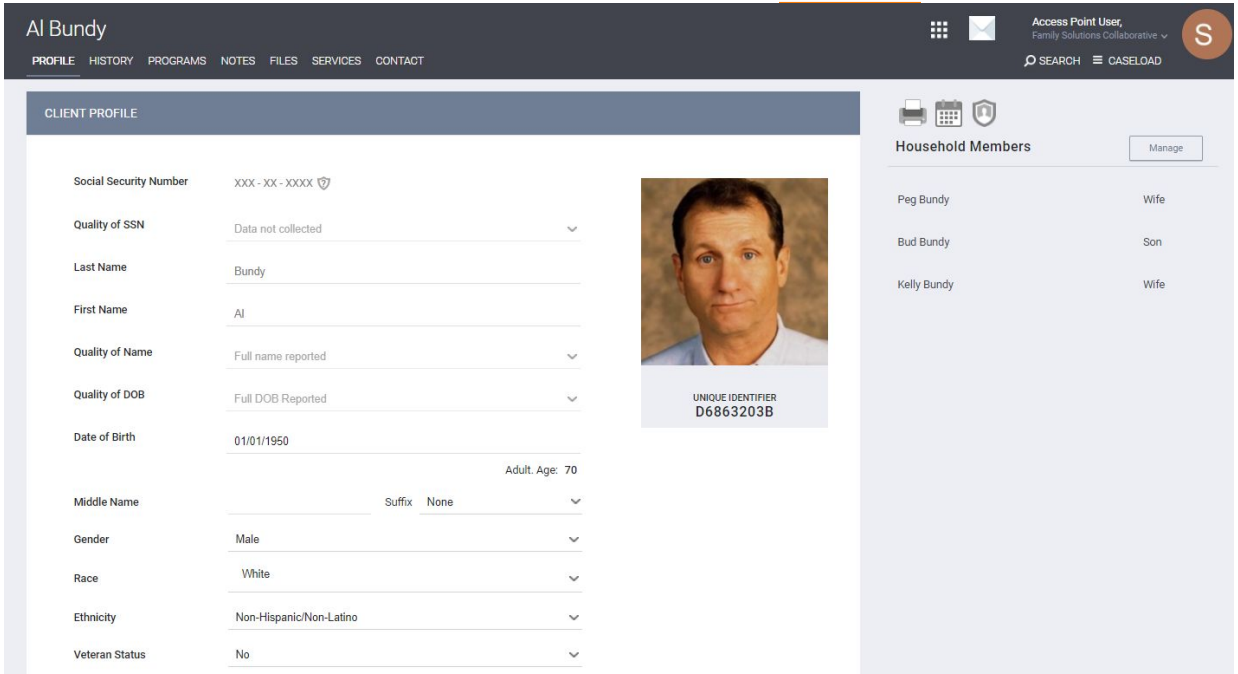
For families, select:
Families Solutions Collaborative

For individuals, select:
County of Orange

Example: Access Point with the Married with Children Agency

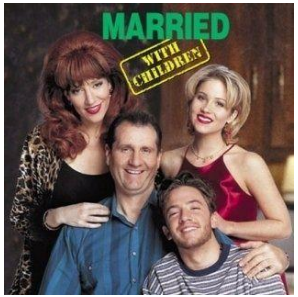


Review Clients' Profile



Review all the members' Profile in HMIS.

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

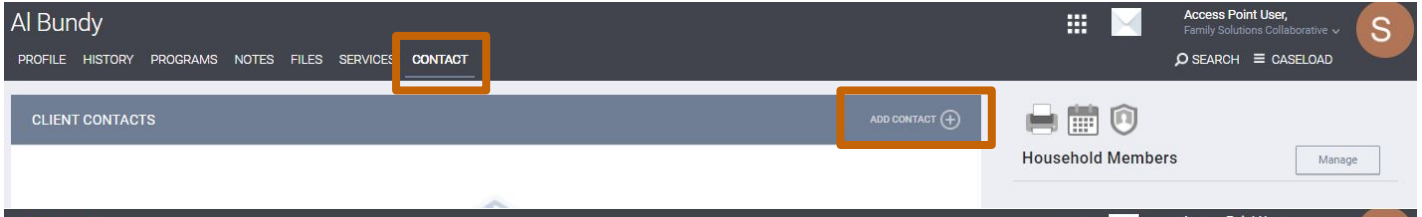


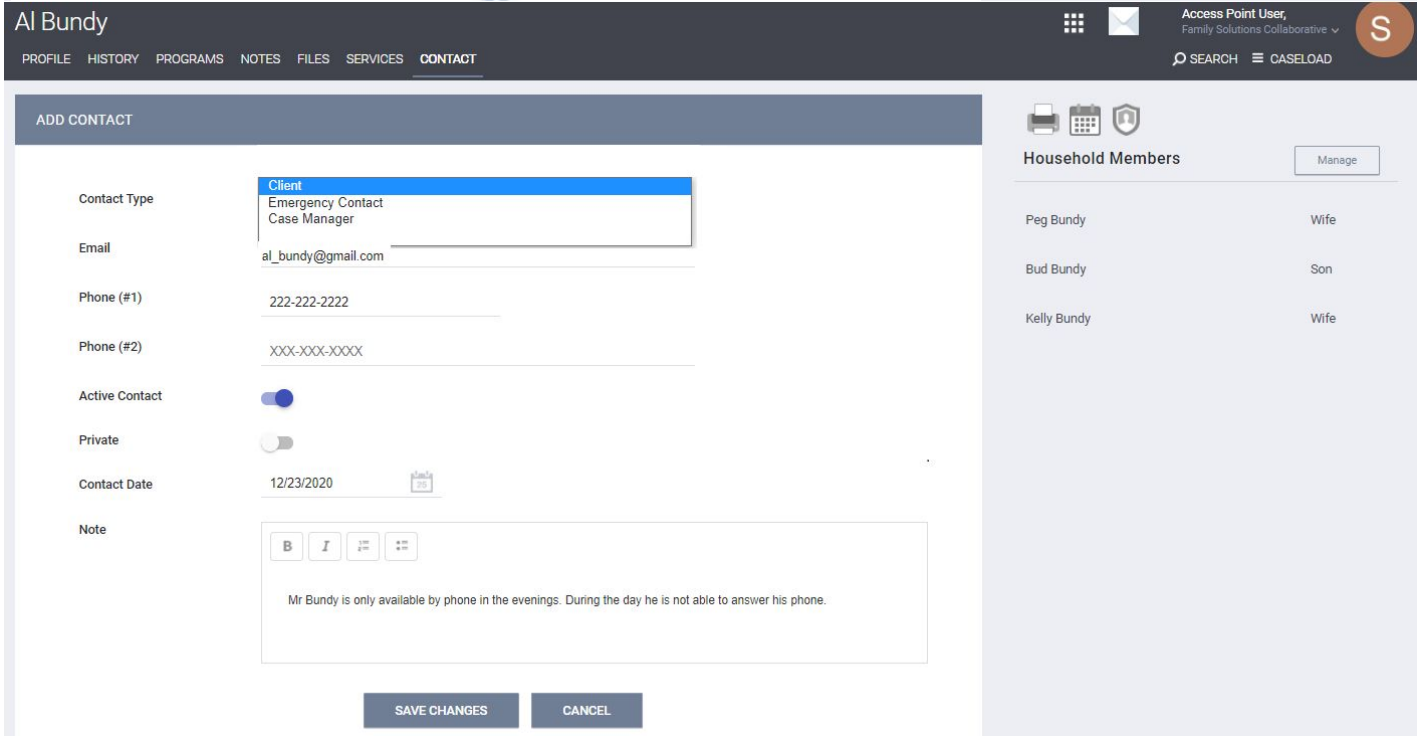
Complete Contact Information

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



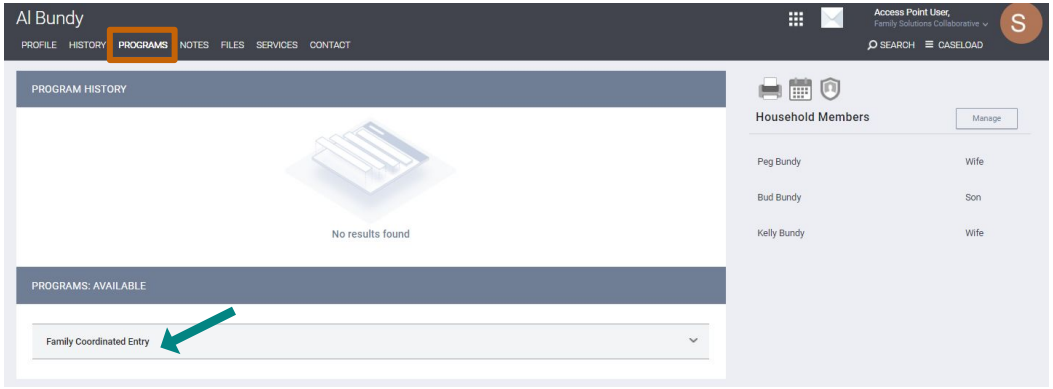


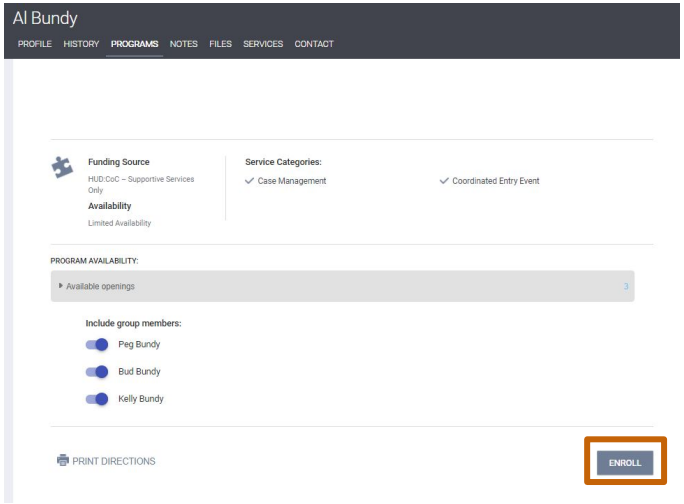
Enroll Client(s) in CES Project

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

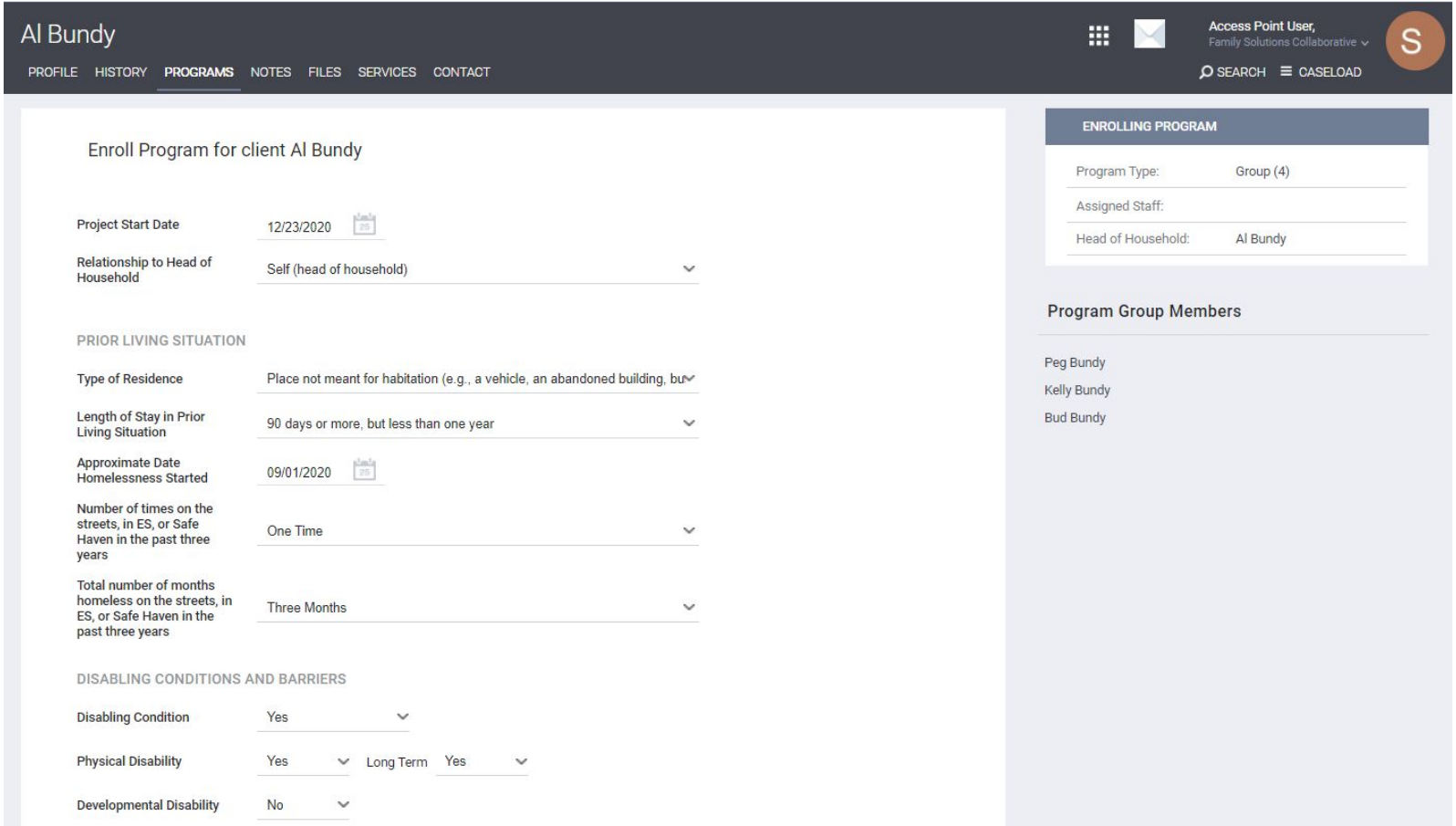
For Families:
Enroll the household in the **Family Coordinated Entry System Project**

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

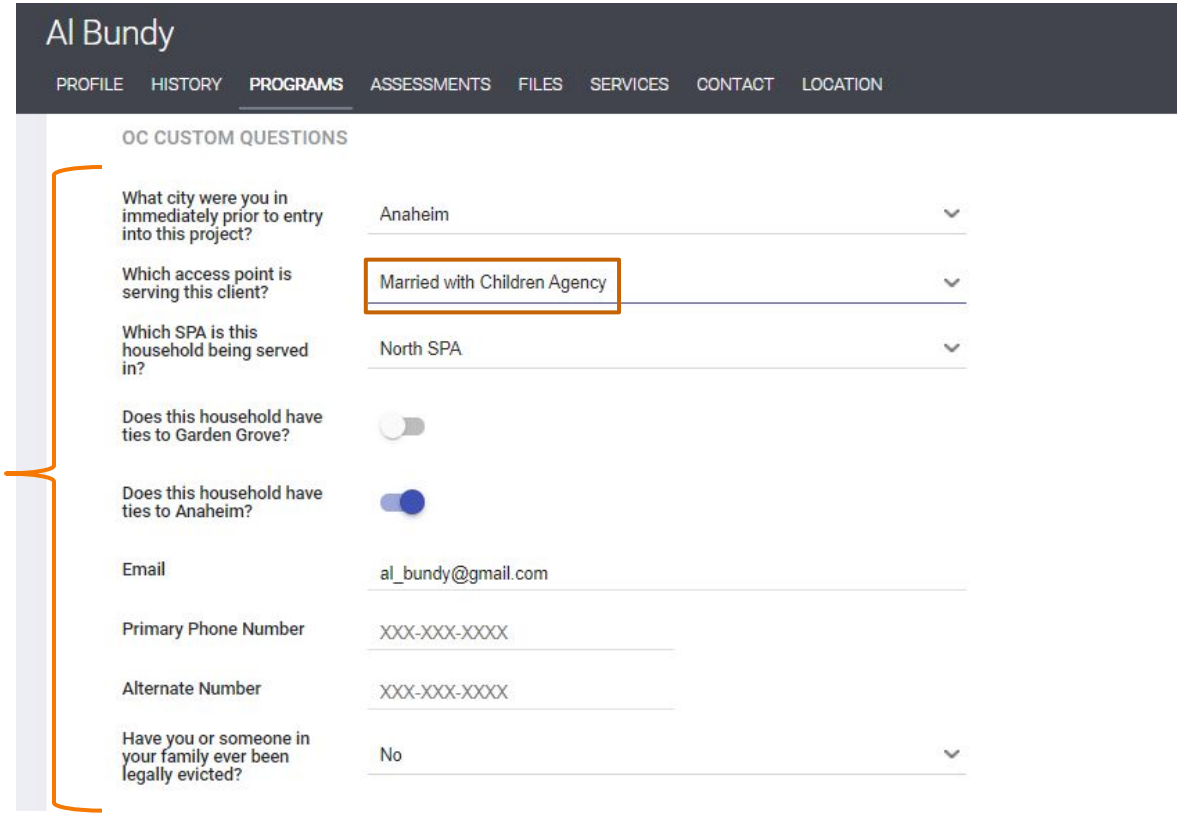




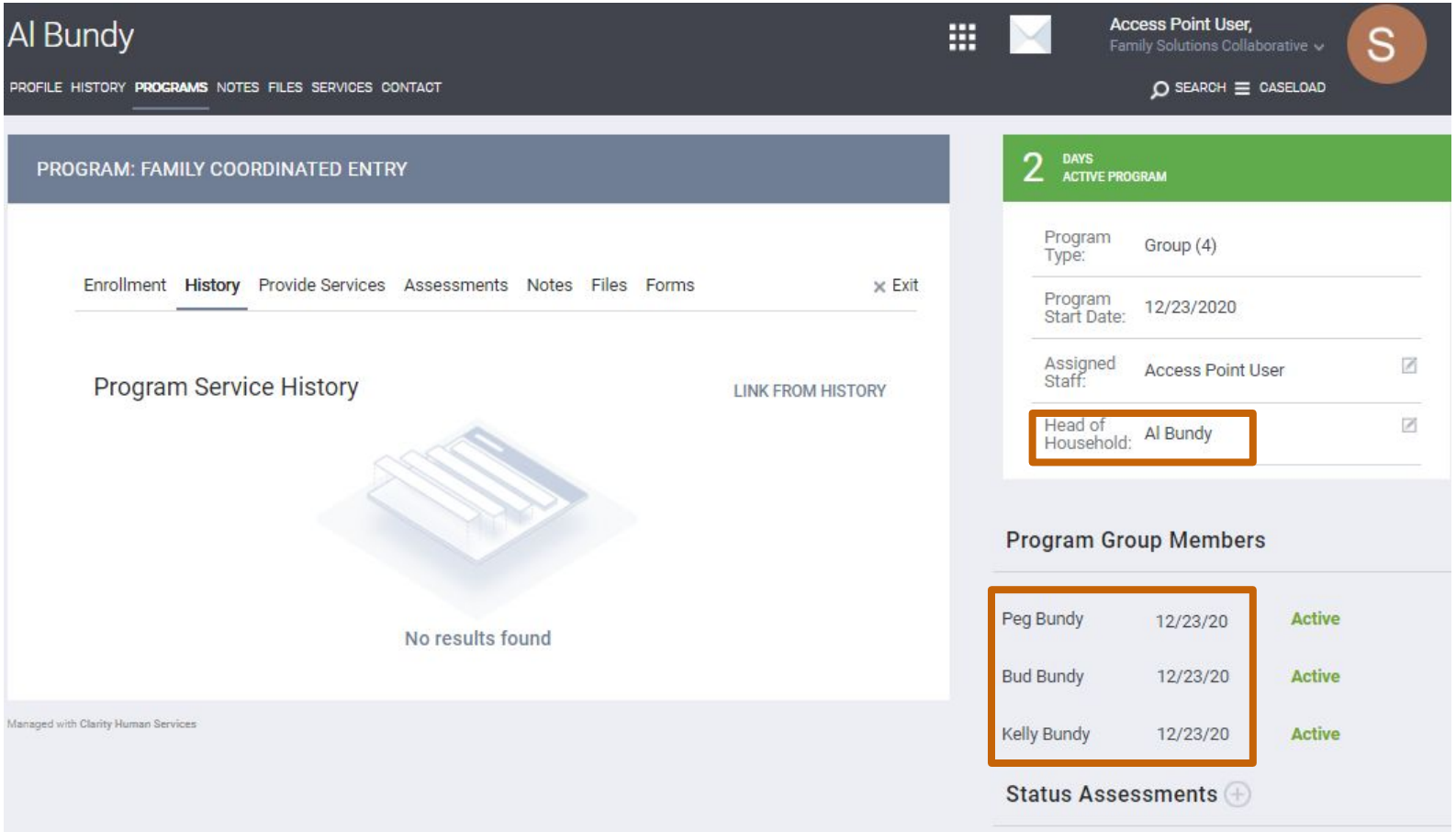
Enroll Client(s) in CES Project (continued)



Enroll Client(s) in CES Project (continued)

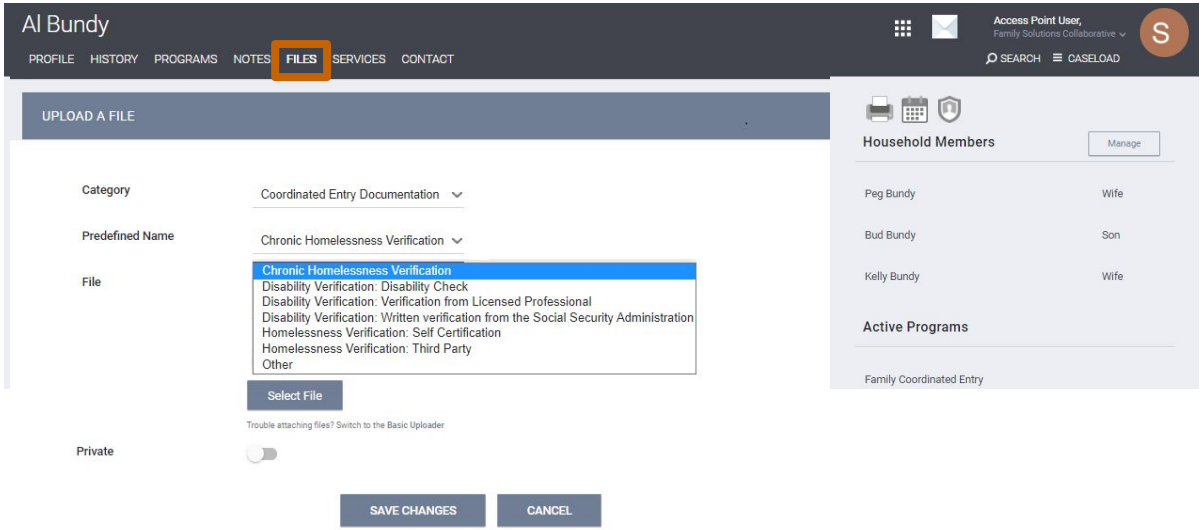


Enroll Client(s) in CES Project (continued)



Collect Required CES Documentation

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



Complete the appropriate VI-SPDAT

For Individuals, select:

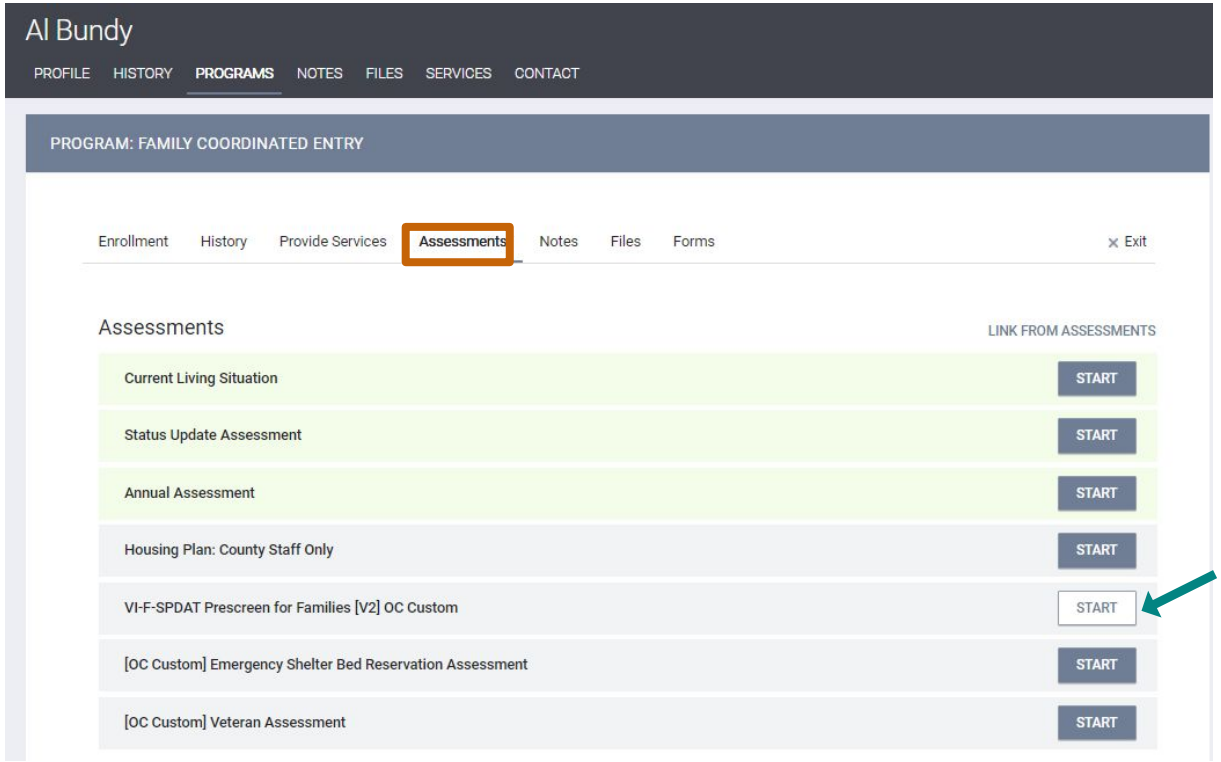
VI-F-SPDAT Prescreen for Families [V2] OC Custom assessment

For Families, select:

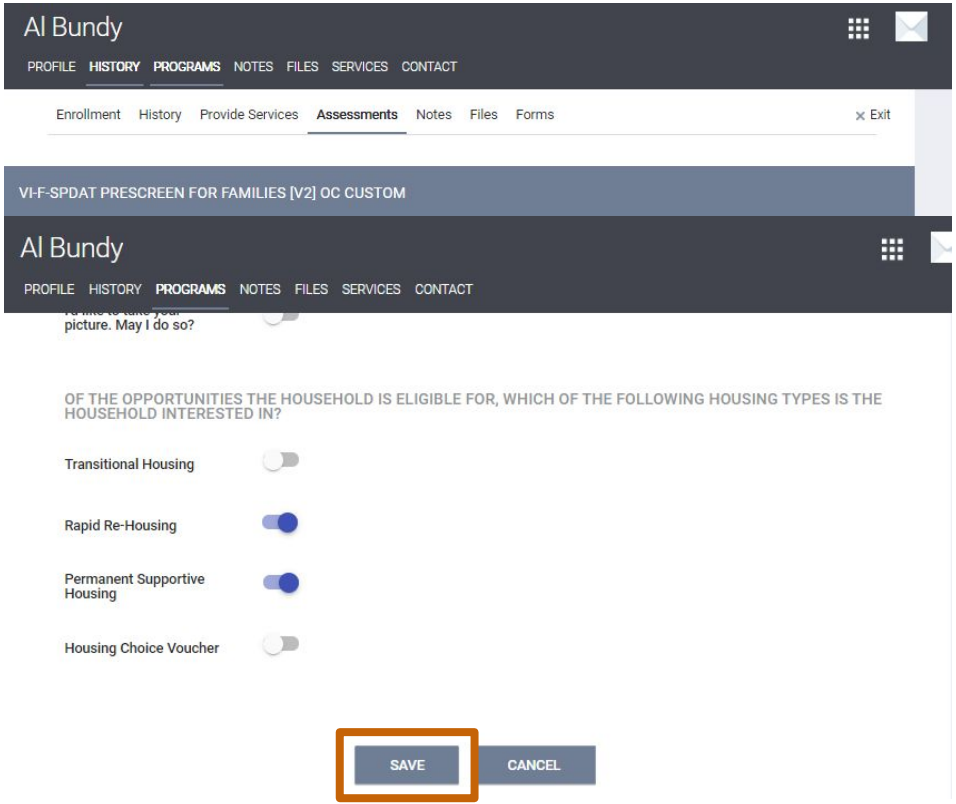
VI-SPDAT Prescreen for Single Adults [V2] OC Custom assessment

For Veterans, select:

Veteran Coordinated Entry Assessment [OC Custom] assessment.

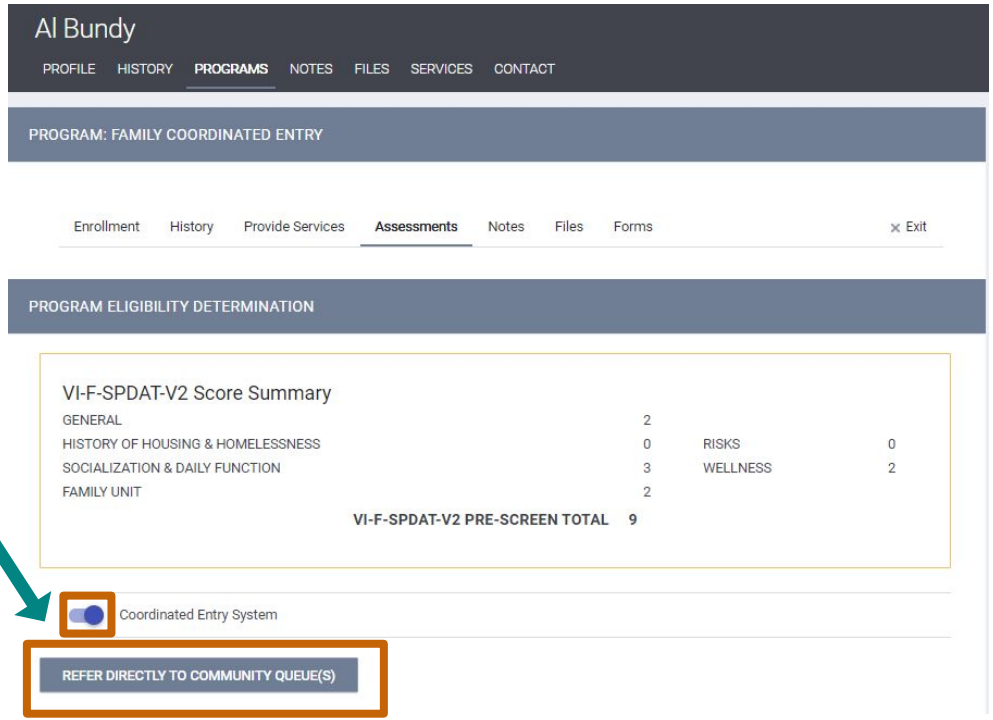


Complete the appropriate VI-SPDAT (continued)

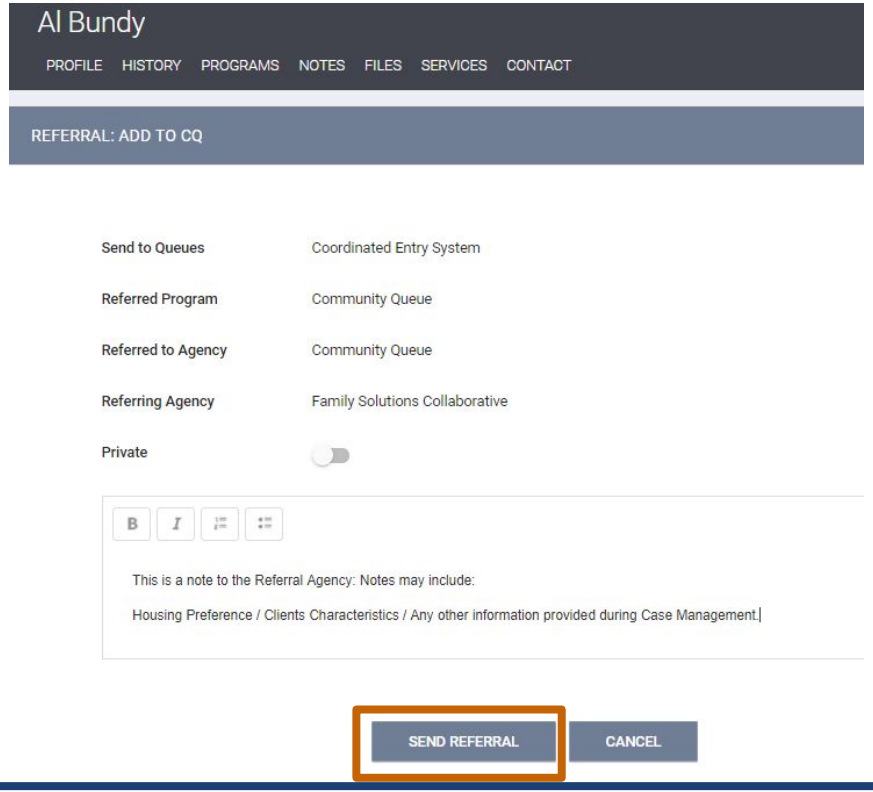


At this point, the Bundy household would be considered to be **"Assessed"**

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



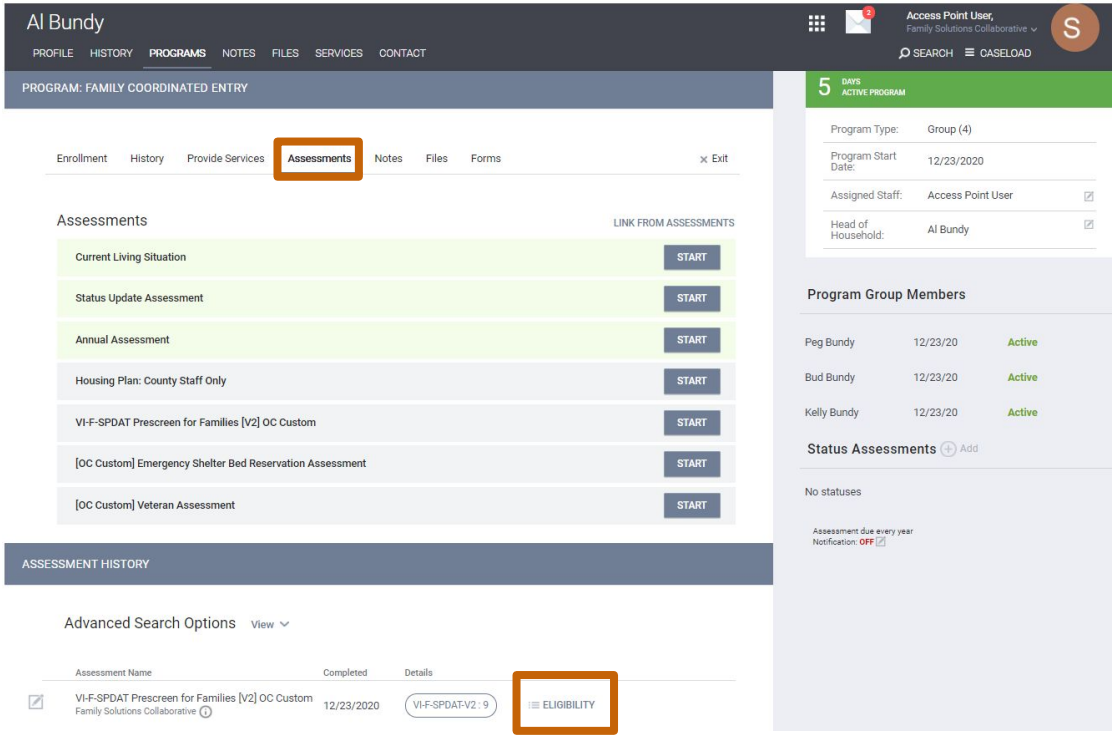
Refer Client(s) to the CQ (Continued)



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



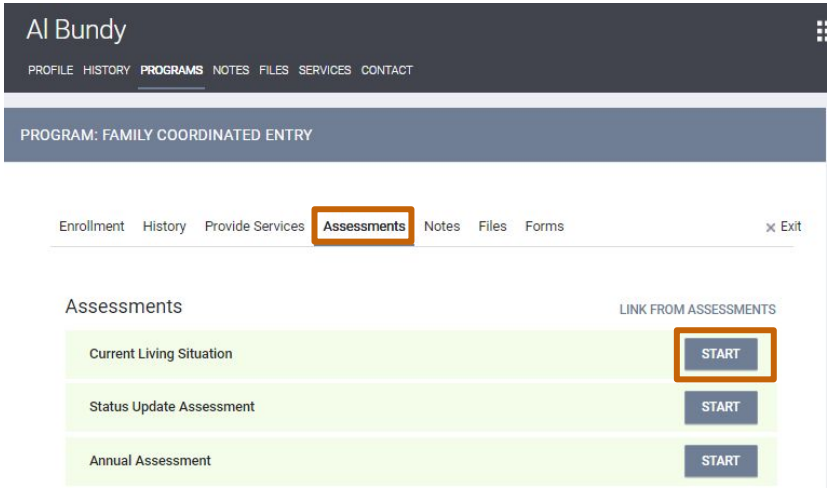
Keep the Client Active in the Community Queue

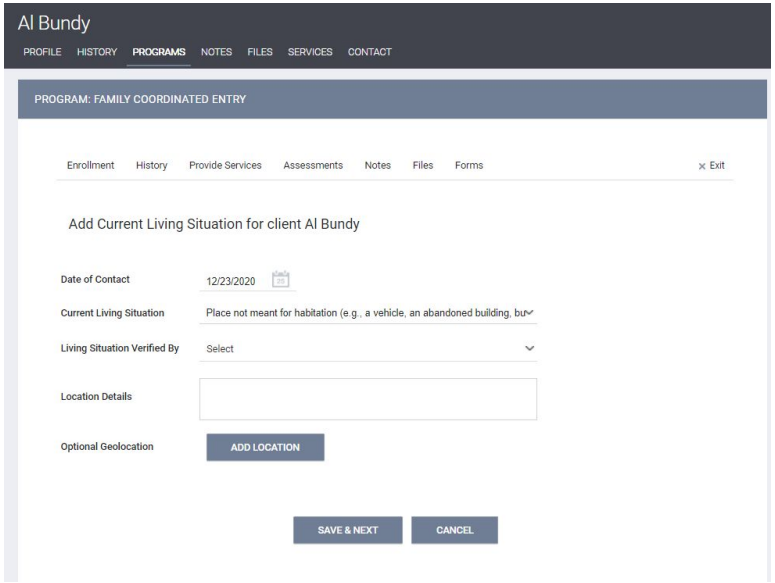
Case Managers should keep the clients Active in the Community Queue by:

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

Add Current Living Situation

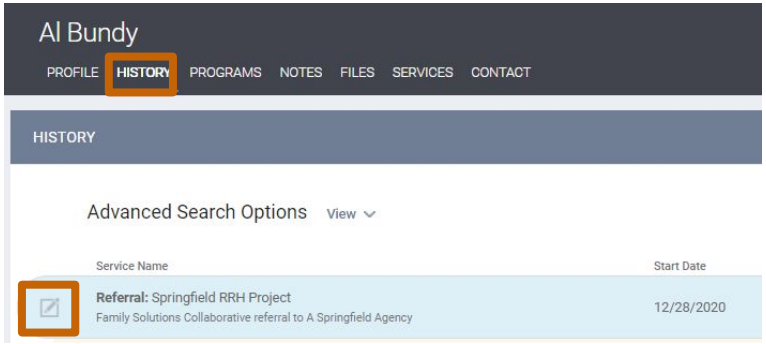
Capture the client's Current Living Situation
at the time of contact



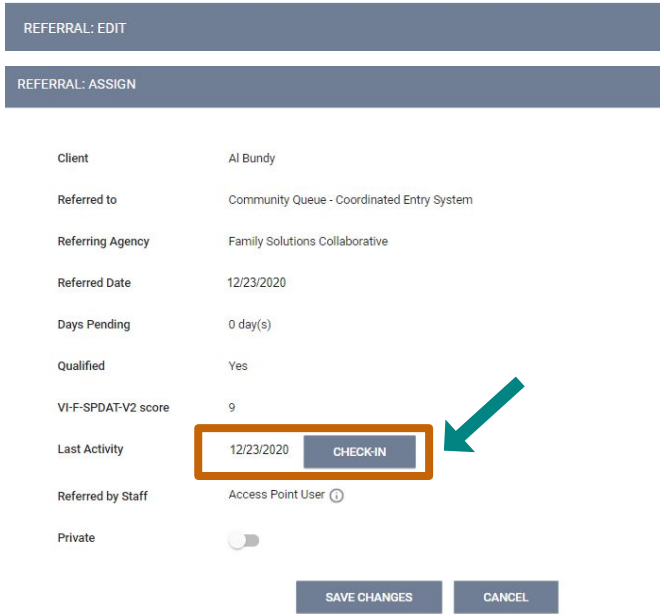


Check-In Button

Open the referral in the HoH's History Page



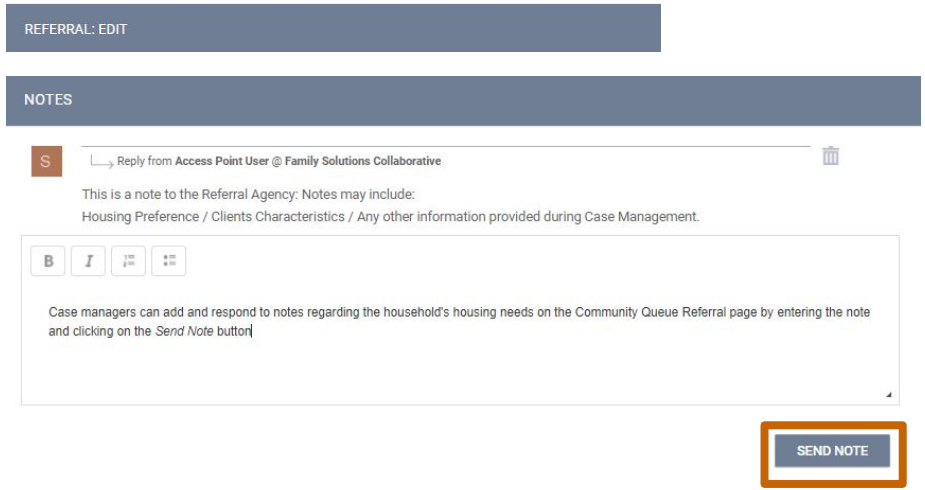
Click the Check-In button



Add Notes

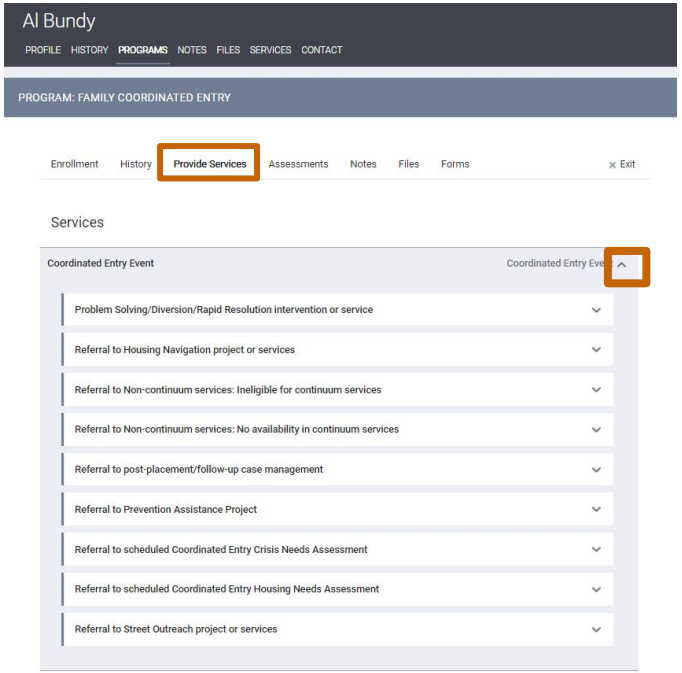
Case Managers can add notes regarding the clients' Housing Needs

Enter Note, and click "Send Note"

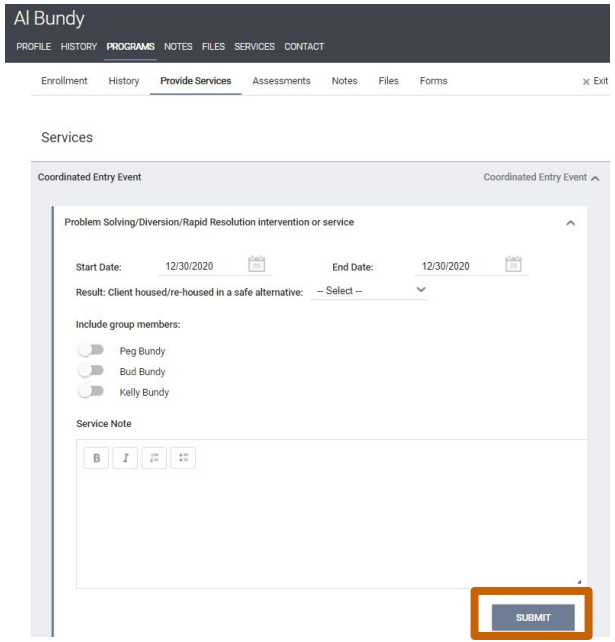


Add a CES Event

CES Events are tracked as services under the CES Project Enrollment



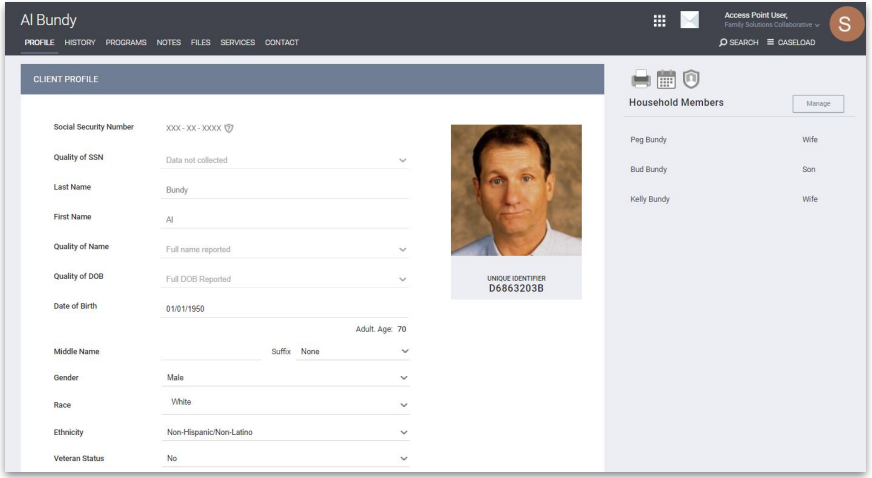
CES events capture key referral and placement events, as well as the results of these events



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



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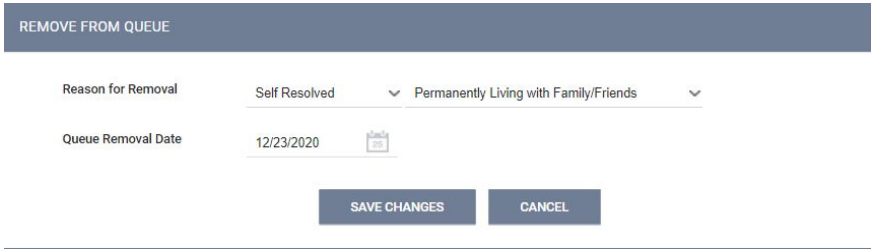


Let’s recap the Access Point Process!

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:

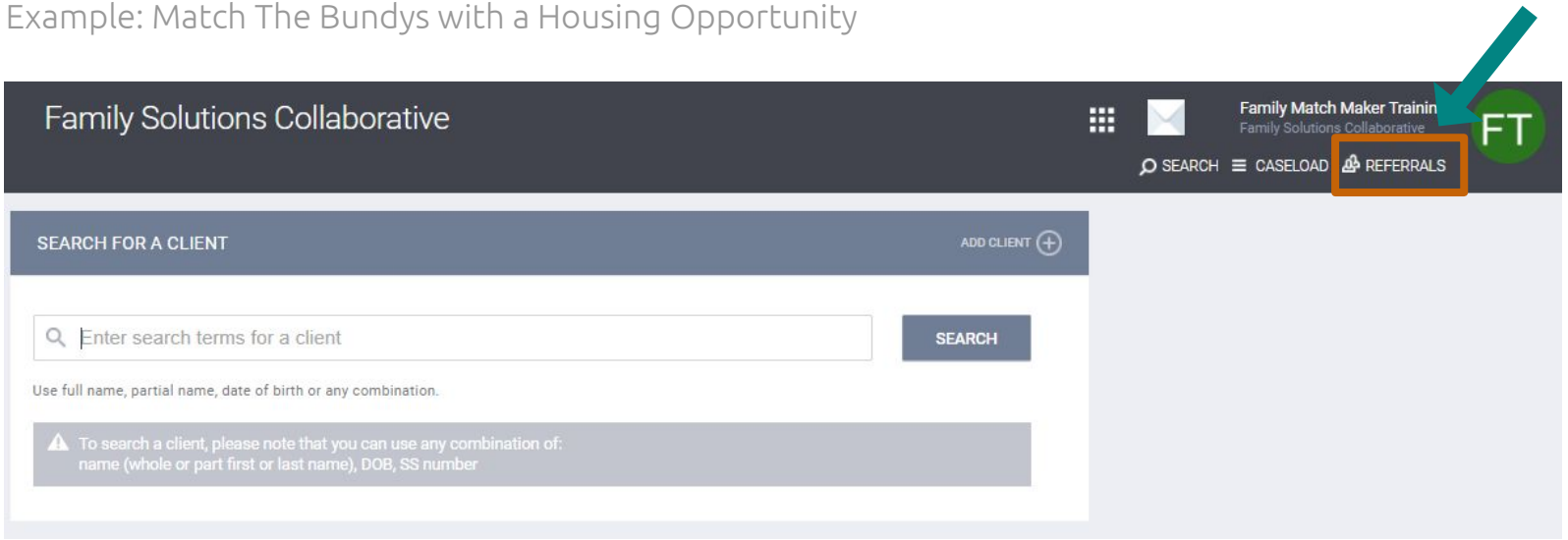
- Clients on the Community Queue Report
- Available Housing Opportunities Report

They considered:

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

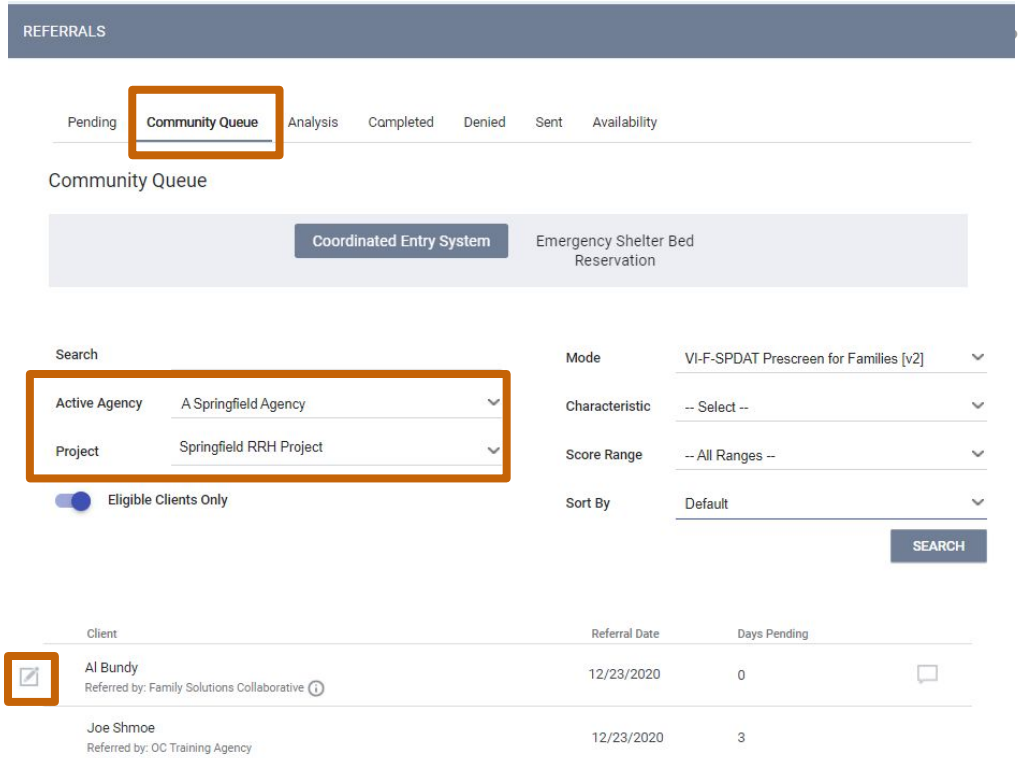
Match a client/household to a Housing Opportunity

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



Match a client/household to a Housing Opportunity

Community Queue Tab



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**

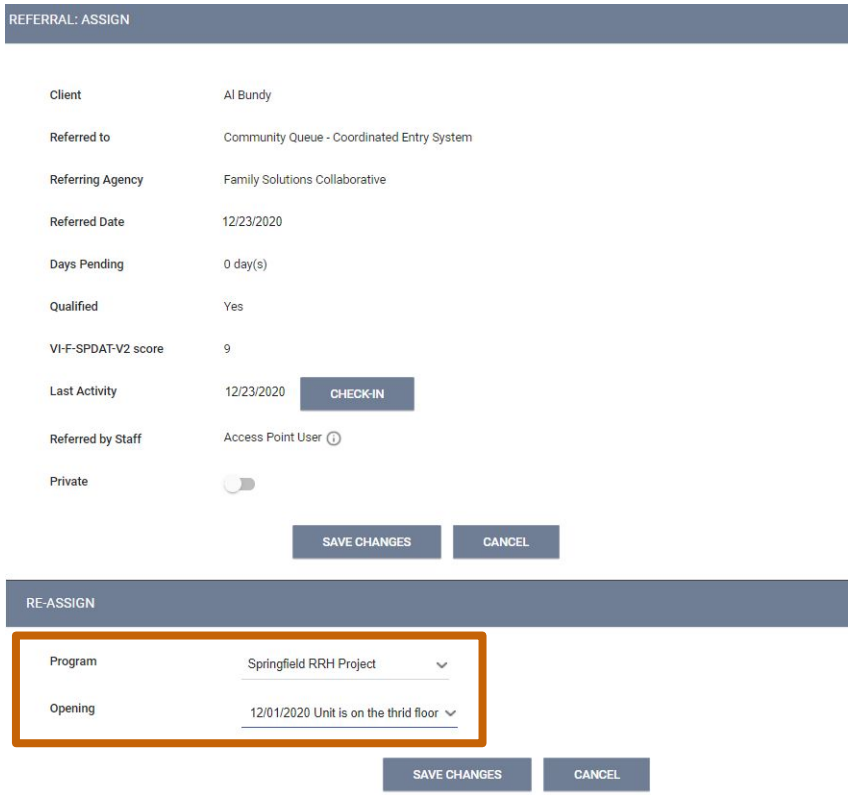
Sort By: Should be set to default (sorts by score)
Enable the Eligible Clients Only toggle

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



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!

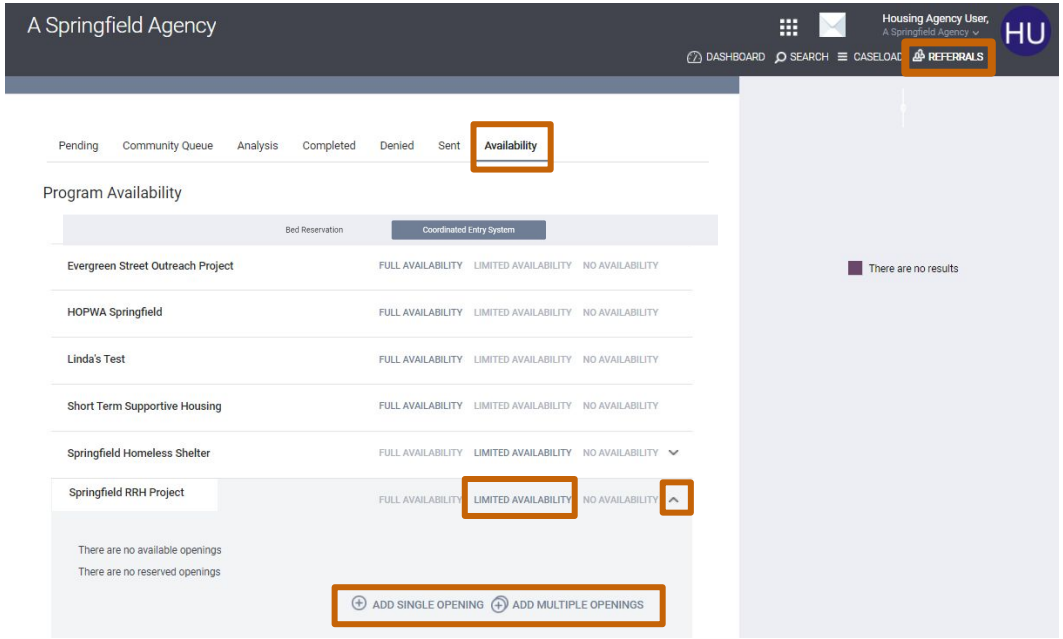
Housing Agencies Process

Example: A Springfield Agency

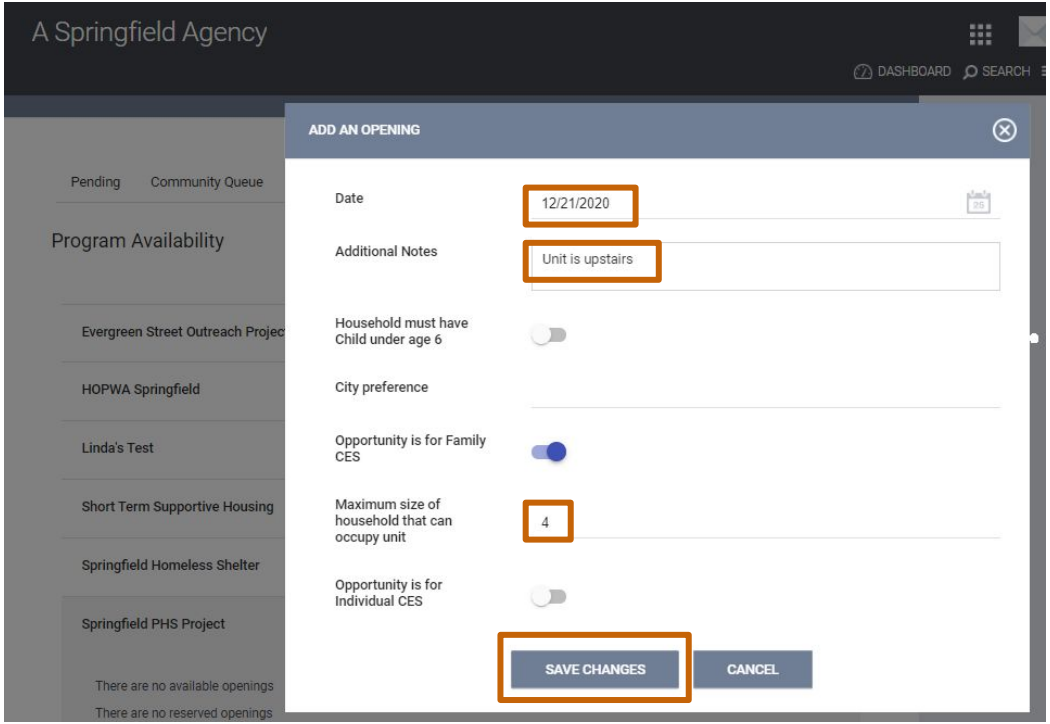
Add Housing Opportunities Availability Tab

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

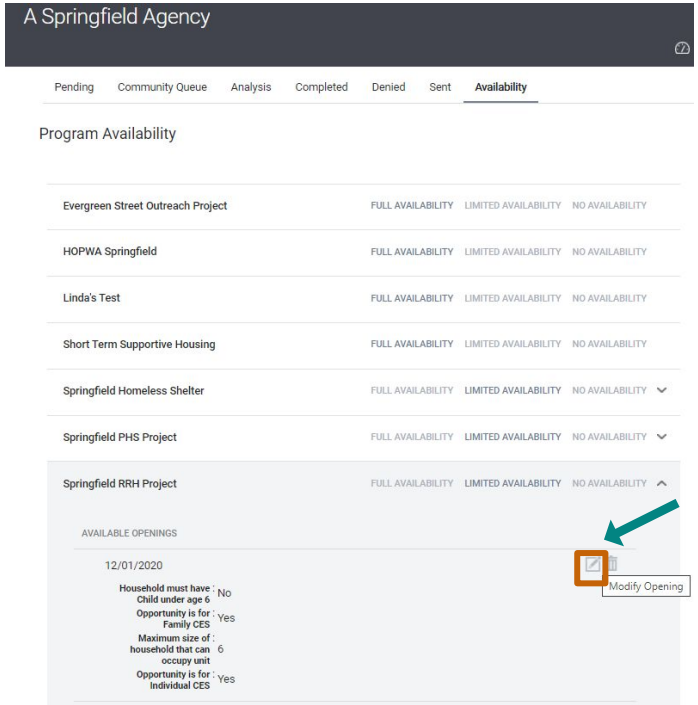
Example: Agency Admin with *"A Springfield Agency"*

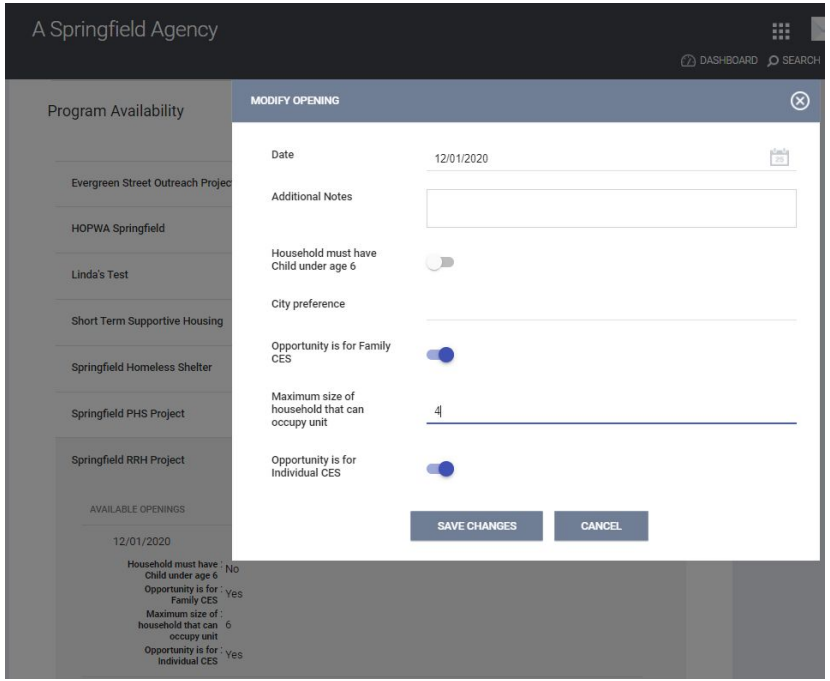


Add Housing Opportunities
Add an Opening



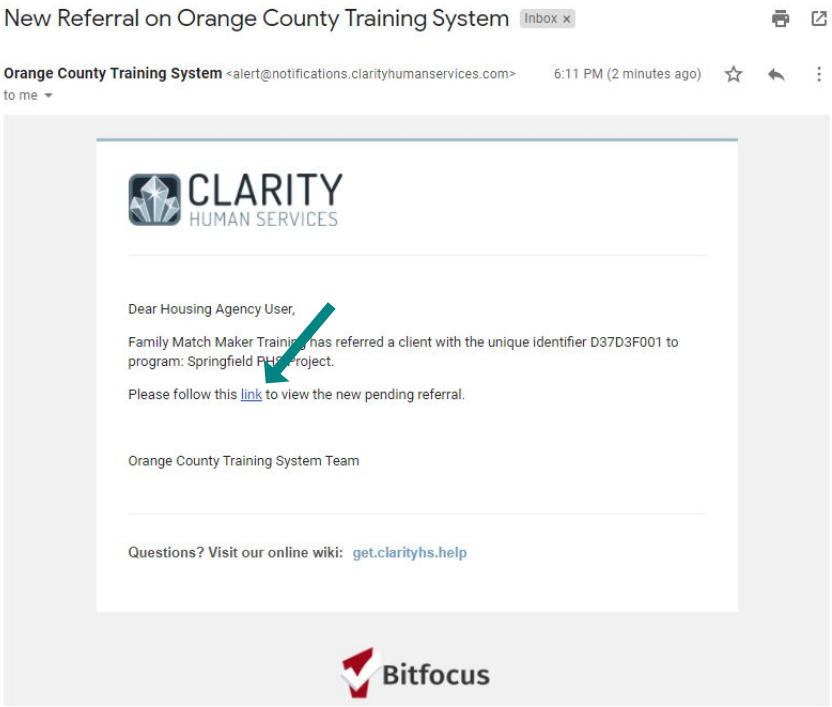
Add Housing Opportunities
Edit an Opening



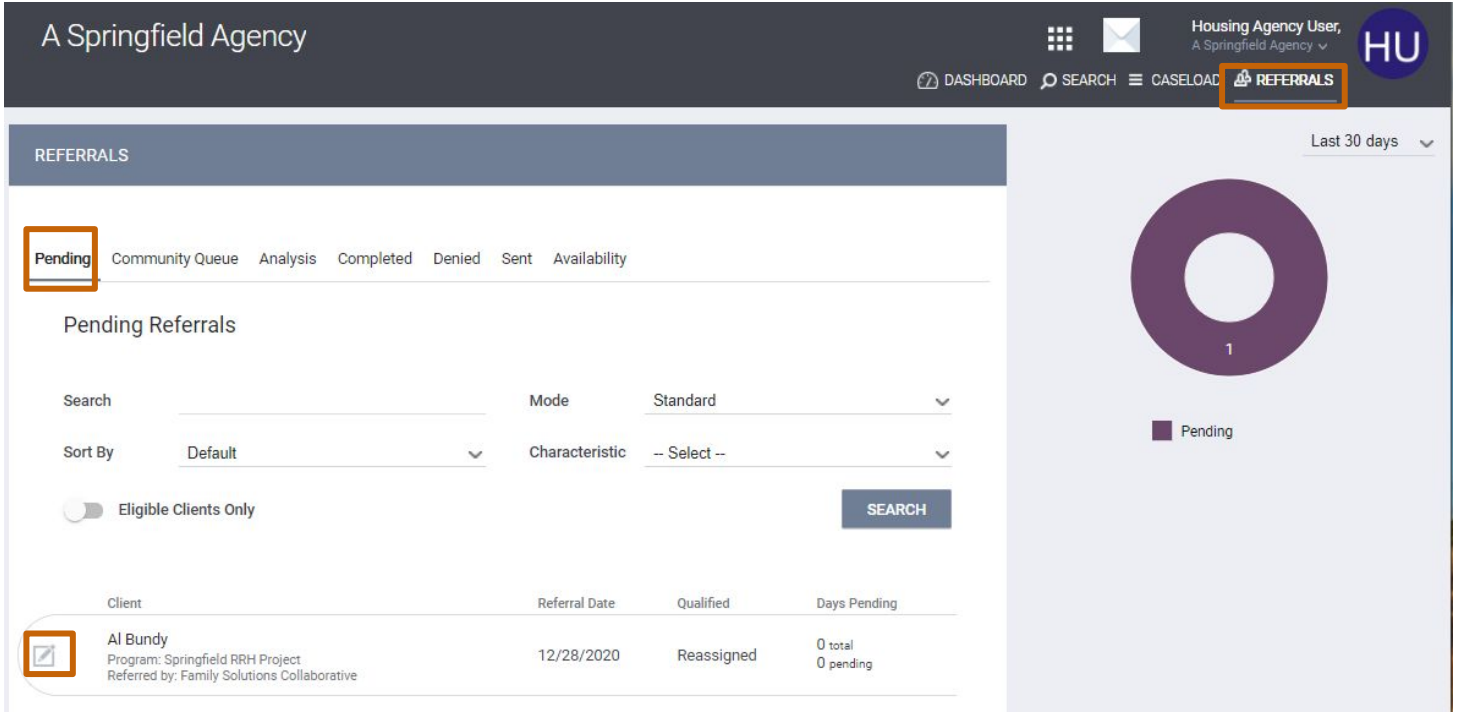


Review Clients Match Email Notification

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



Review Pending Tab



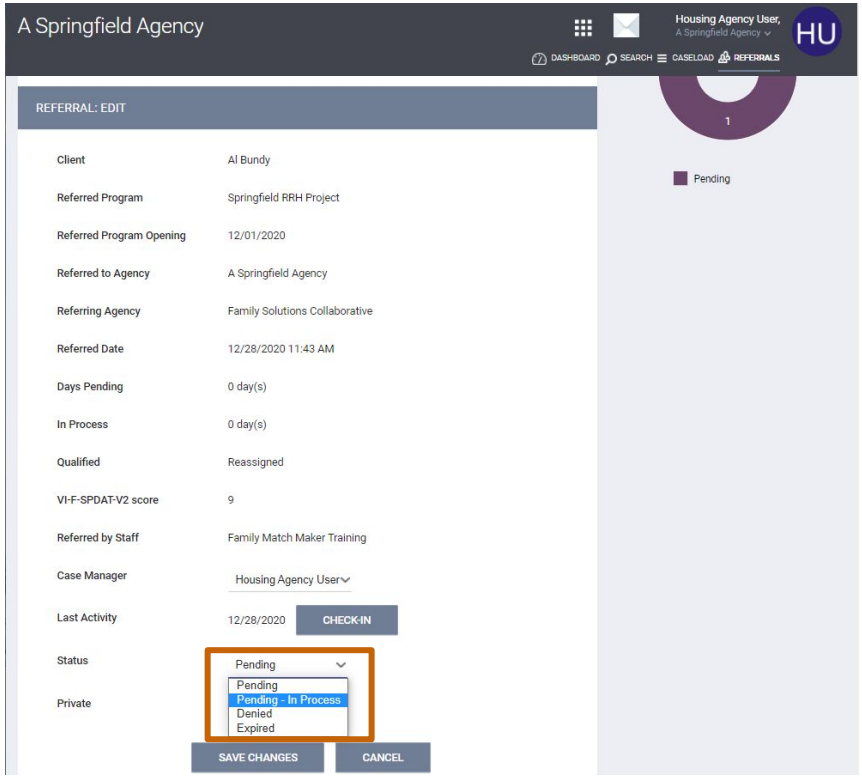
Reviewing and Accepting a Referral

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

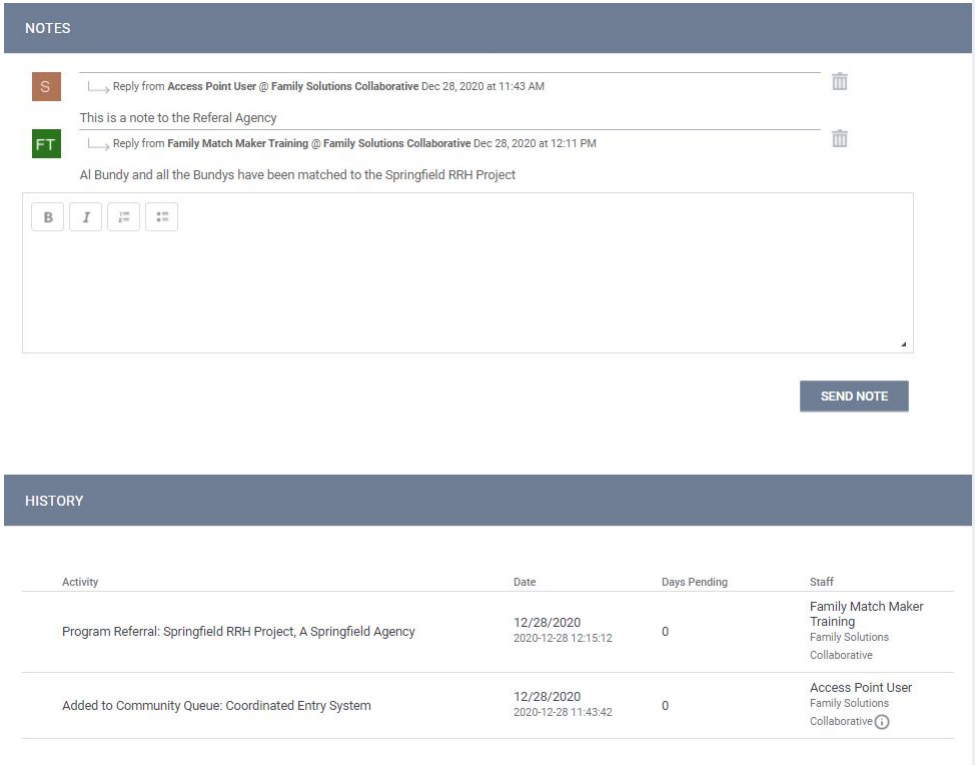


Reviewing and Accepting a Referral (continued)

Edit Referral Screen

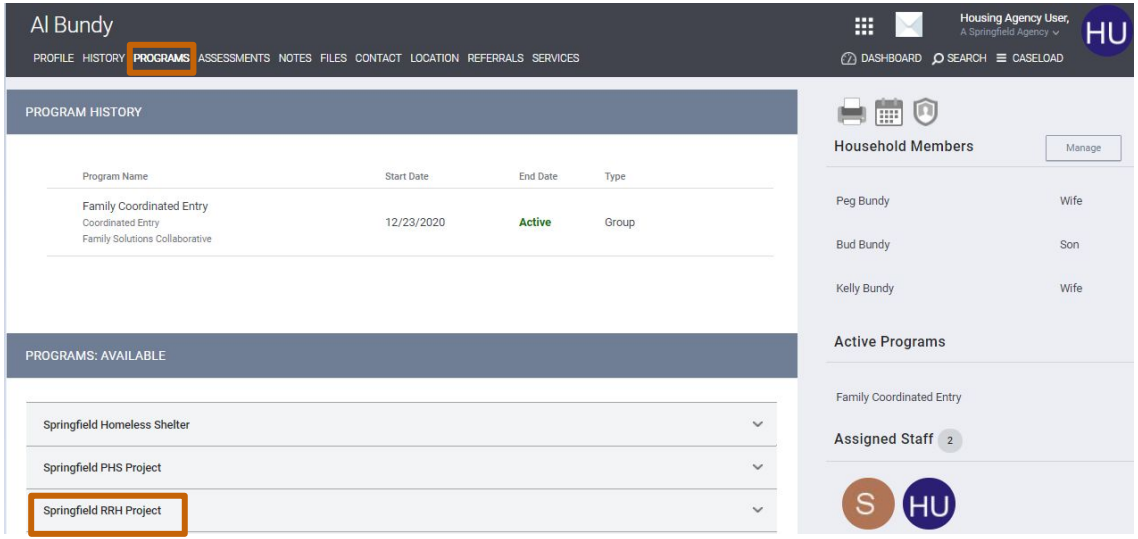
Review Notes regarding the referral

Review History of the referral



Enroll Clients in the Housing Project

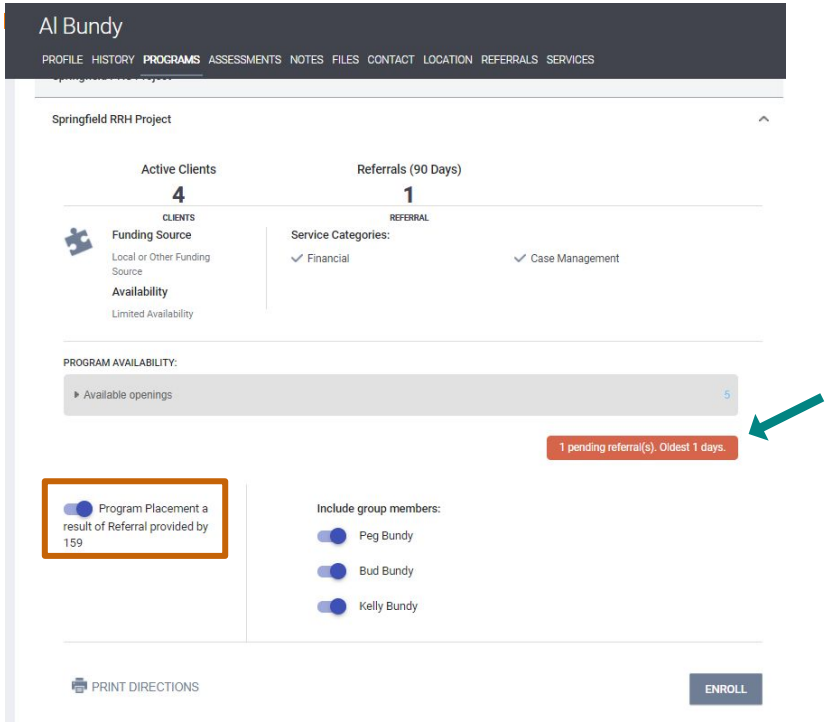
Navigate to the HoH's Programs Page (top menu of Client Record)
Locate project the clients were referred to



Enroll Clients in the Housing Project (continued)

Select the “Program Placement Referral Provided..” toggle

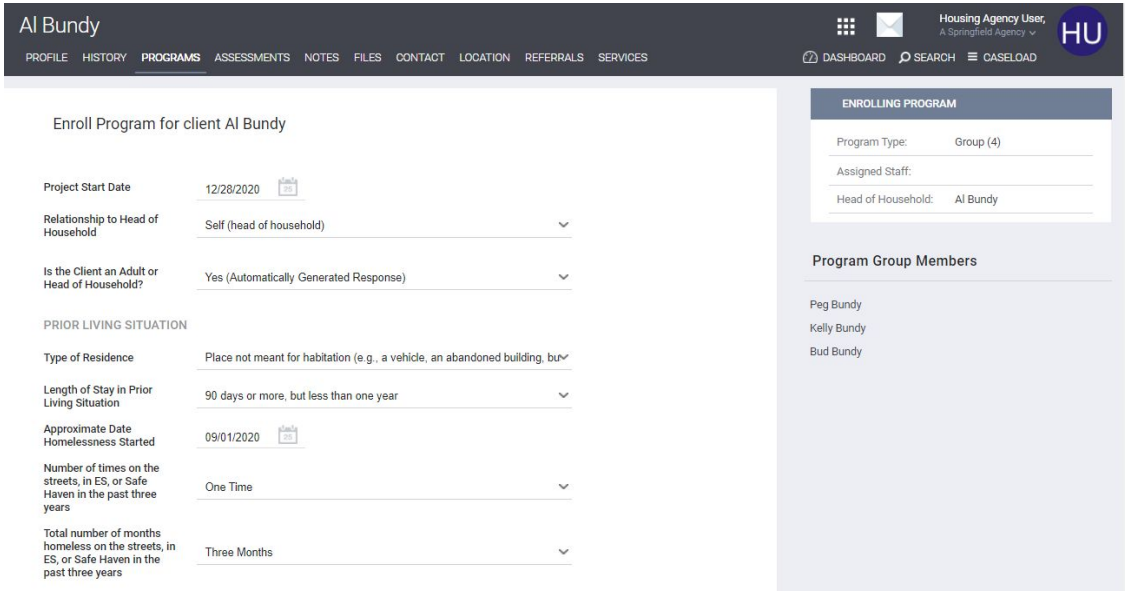
For families, select all the household members



Enrollment in the Housing Project

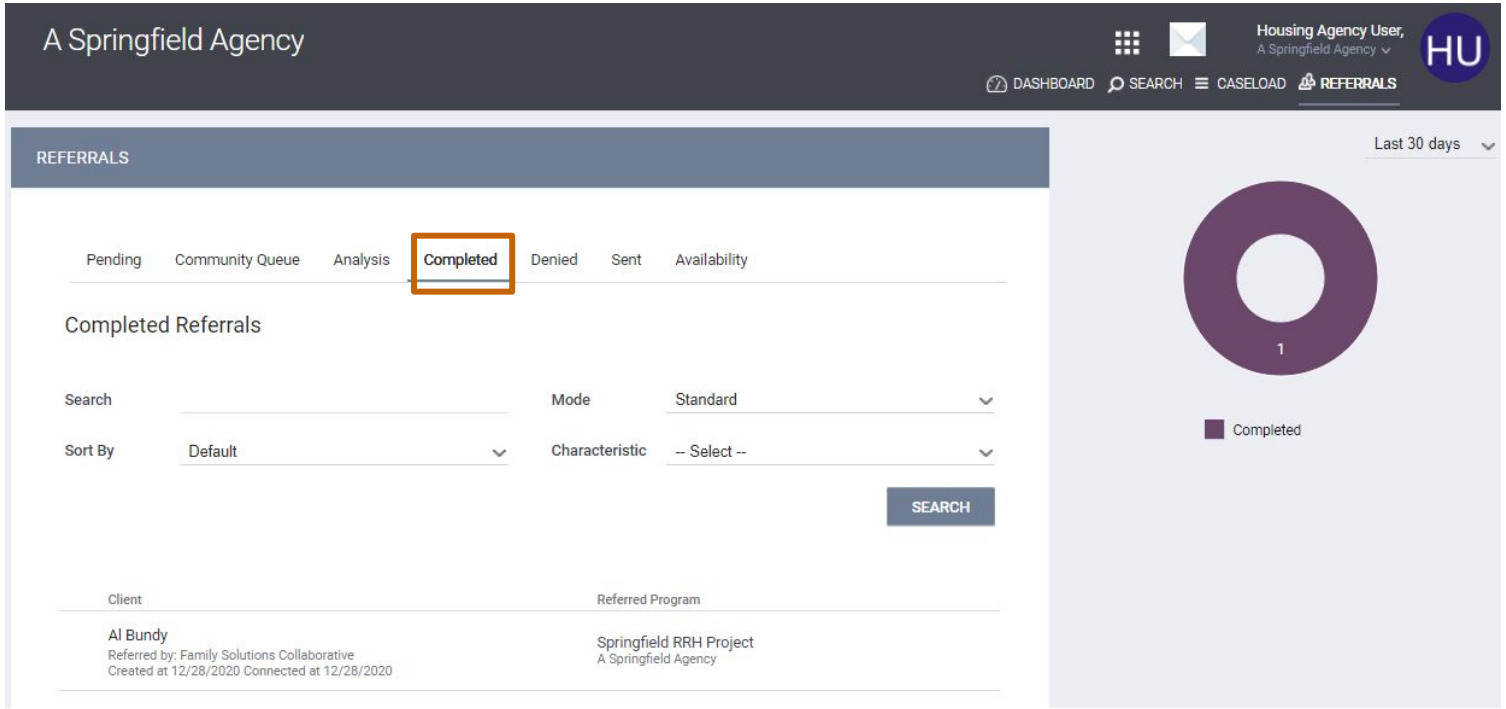
Answer the enrollment questions for all members of the household

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



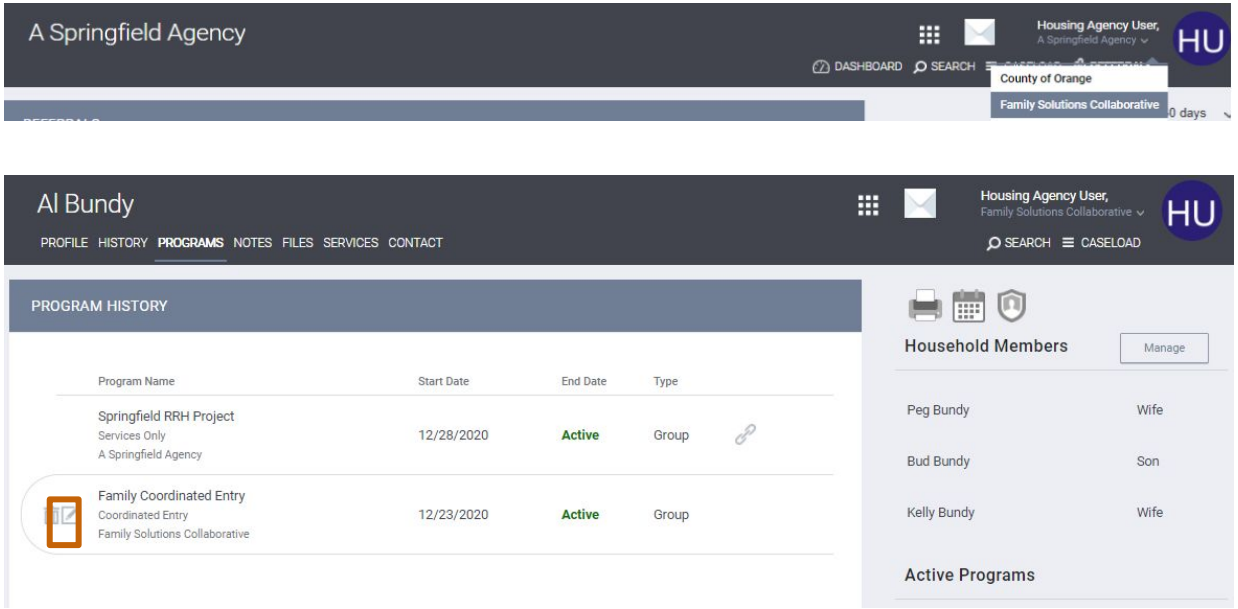
Completed Referral

The client is now in the Completed Tab



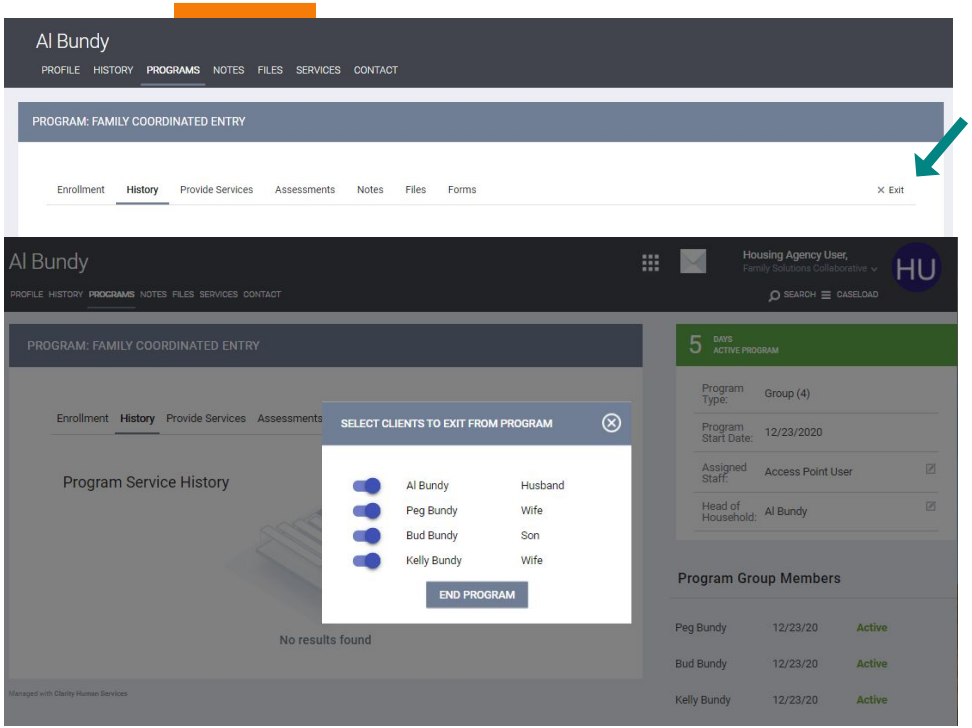
Exit clients from the CES Enrollment

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



Exit clients from the CES Enrollment (continued)

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

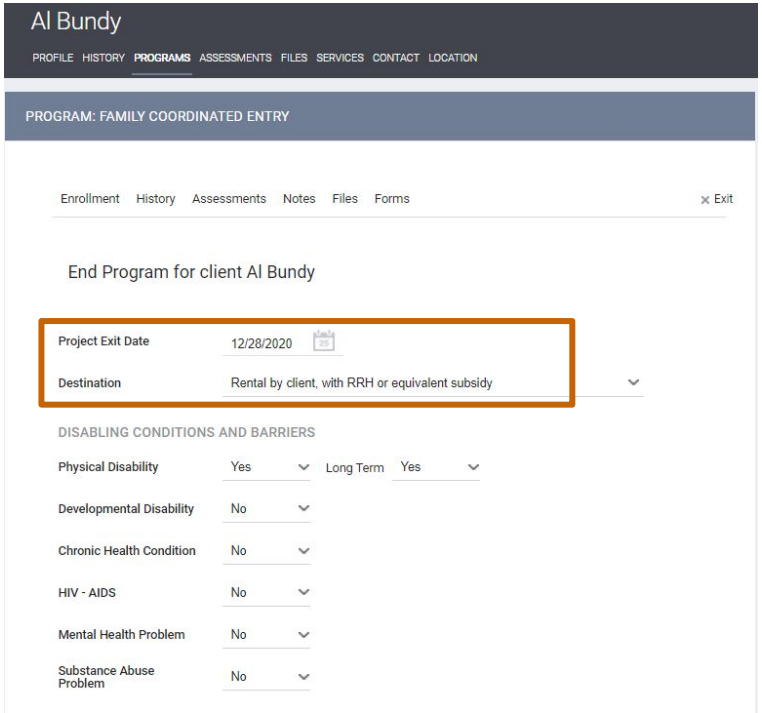


Exit clients from the CES Enrollment (continued)

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



History of a Successful Referral

Denying a Referral

Edit Referral Screen

Change Status from Pending to Denied

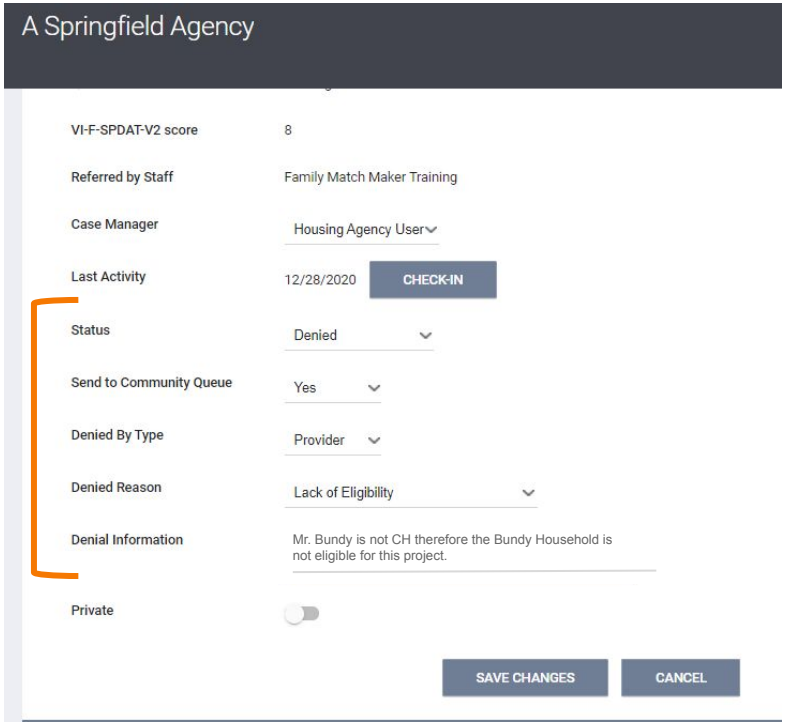
Specify if the client should be send back to the community queue or not

Specify who is denying the referral

Enter denied reason

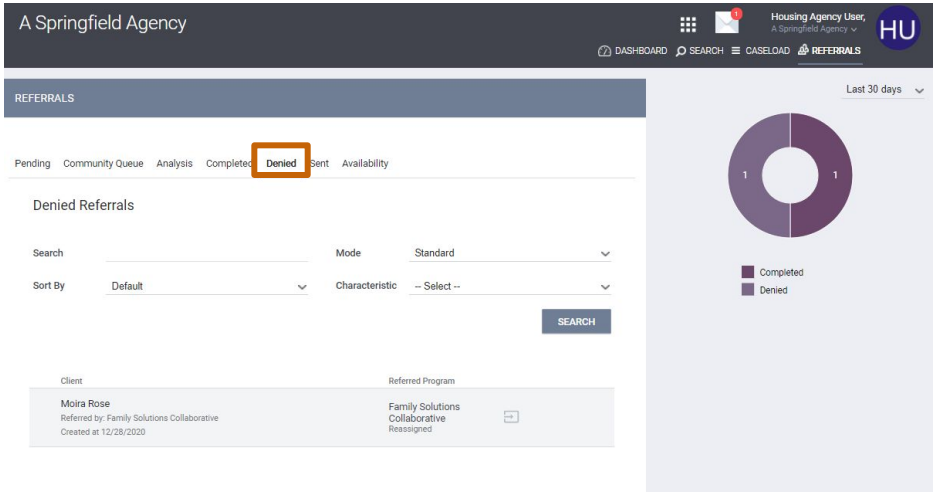
Denial Information Note

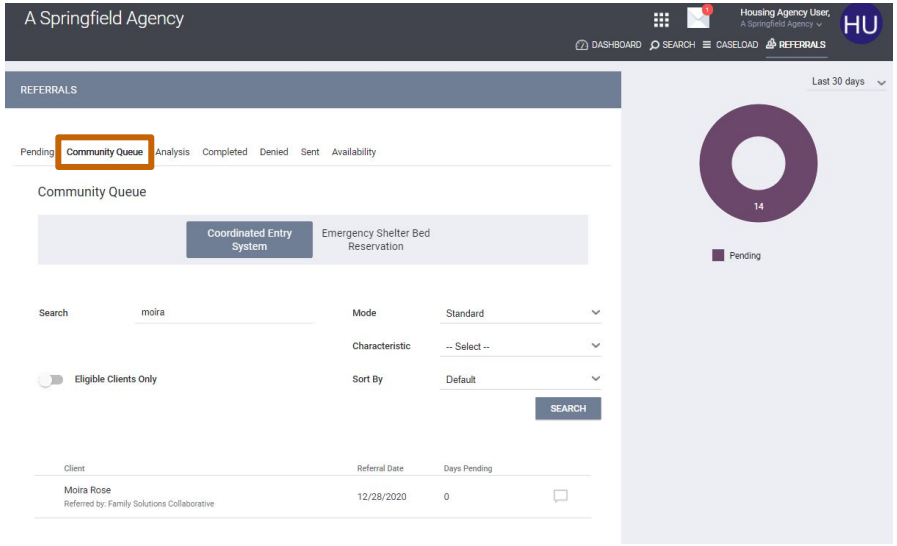
“Save Changes”



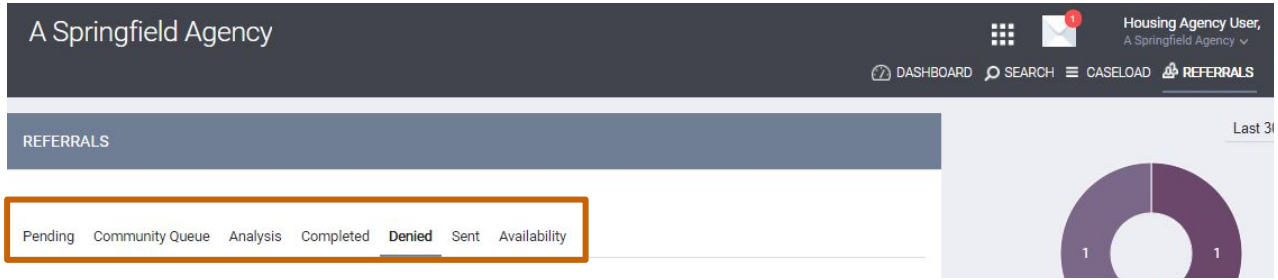
Denying a Referral

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





Tabs in the Referrals Page



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.