

HMIS Training

Coordinated Entry System Reports

Please enter your agency
name in the chat box



Agenda

1. What is the Coordinated Entry System (CES)?
2. Discussion of most commonly used CE reports
 - a. Enrollment Data
 - b. Clients on the Community Queue (CQ)
 - c. CQ List Maintenance
 - d. Housing Opportunities and Matches
 - e. Common Data Quality Concerns

What is the Coordinated Entry System?

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



CES Components

- Individual CES (ICES) - adult only households; managed by Friendship Shelter
- Family CES (FCES) - households with adults and children; managed by Family Solutions Collaborative
- Veteran CES (VCES) - households with at least one veteran; managed by County of Orange
- Youth CES (TAYCES) - all household members are under age 25; managed by County of Orange

CES Set-up in HMIS

Agency Name

Project Name

Assessment Name

County of Orange

Individual Coordinated Entry System: Single person households or households where all members are 18 years old or older

Individual CES Assessment: Complete this assessment to be matched to a permanent housing opportunity through the ICES component

Veteran Coordinated Entry Assessment: Complete this assessment to be matched to a permanent housing opportunity through the VCES component (household must include at least one veteran)

Individual Bed Reservation Assessment: Complete this assessment to be matched to a shelter opportunity through the ICES component

Prevention Assessment Tool: Complete this assessment to be matched to a homelessness prevention opportunity through the ICES component

Stepping Up Assessment Tool: Complete this assessment for households in Rapid Re-Housing projects that need to be matched to a housing opportunity through the ICES component for additional or ongoing rental assistance

Moving On Assessment Tool: Complete this assessment for households in Permanent Supportive Housing projects that need to be matched to a housing opportunity through the ICES component with less intensive services

Family Solutions Collaborative

Family Coordinated Entry System: Households with at least one adult and one child, or households that expect to include a minor child. This includes families going through reunification, are temporarily separated, or are pregnant.

Family CES Assessment: Complete this assessment to be matched to a permanent housing opportunity through the FCES component

Veteran Coordinated Entry Assessment: Complete this assessment to be matched to a permanent housing opportunity through the VCES component (household must include at least one veteran)

Family Bed Reservation Assessment: Complete this assessment to be matched to a shelter opportunity through the FCES component

Prevention Assessment Tool: Complete this assessment to be matched to a homelessness prevention opportunity through the FCES component

Stepping Up Assessment Tool: Complete this assessment for households in Rapid Re-Housing projects that need to be matched to a housing opportunity through the FCES component for additional or ongoing rental assistance

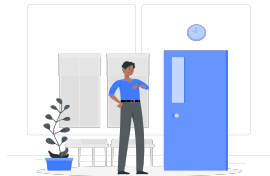
Moving On Assessment Tool: Complete this assessment for households in Permanent Supportive Housing projects that need to be matched to a housing opportunity through the FCES component with less intensive services

Youth and Veteran households should be enrolled in the CES project that matches their household composition. Veteran households will be included on the Veteran Registry when their veteran status is yes on the client profile and they are enrolled in CES. Youth households will be included on the TAY Registry if all household members are under the age of 25 and they are enrolled in CES.

Coordinated Entry System Roles

Access Point

Connect clients to CES
and offer additional
services



Matchmaker

Refer clients to
housing opportunities



Housing Agency

Provide housing/
housing search
assistance for clients
in CES





Enrollment Data

Active Clients Reports

Use these reports to see all clients active in a Coordinated Entry project for each CES component

Agency: County of Orange/Family Solutions Collaborative

Report Location: Reports > Data Analysis > OC Clarity System Reports > Coordinated Entry

- FCES Active Clients
- ICES Active Clients
- VCES Active Clients
- TAY CES Active Clients



Active Clients Reports

Export in CSV format to view list of clients

Report Fields:

- Access Point
- City Prior to Entry
- City of Last Known Permanent Address
- Residence Prior to Entry
- Approximate Date Homelessness Started
- Chronically Homeless Status
- Disability Status
- Current Living Situation
- CES Assessment data
- Household Size





Clients on the Community Queue

Community Queue Reports

Use these reports to see all clients on the Community Queue for each CES component

Agency: County of Orange/Family Solutions Collaborative

Report Location: Reports > Data Analysis > OC Clarity System Reports > Coordinated Entry

- FCES Community Queue
- ICES Community Queue
- VCES Community Queue
- TAY CES Community Queue



Community Queue Reports

Export in CSV format to view list of clients

Report Fields:

- Client Personal ID & Unique ID
- Household & Enrollment ID
- Client Full Name & Alias
- Client Last 4 SSN
- Current Age
- Veteran Status
- Disabling Condition
- Chronic Health Longterm
- Developmental
- HIV/AIDS
- Mental Health Longterm
- Physical Longterm
- Substance Use Longterm
- Disability Status
- Chronically Homeless Status
- Project Start Date
- Approximate Date Homelessness Started
- Residence Prior to Entry
- City of Last Known Permanent Address
- City Prior to Entry
- CES Assessment data
- Household Size
- Current Living Situation
- Clients Last Activity Date
- List of Referral Note
- Assigned Staff & Assigned Staff Home Agency
- Client File Names
- Disability and CH Documentation

Households Waiting for Bed Reservation



Use these reports to see all clients on the Bed Reservation Queue for each CES component

Agency: County of Orange/Family Solutions Collaborative

Report Location: Reports > Data Analysis > OC Clarity System Reports > Bed Reservation

- FCES Households Waiting for Bed Reservation
- ICES Households Waiting for Bed Reservation



FCES Households Waiting for Bed Reservation

Export in CSV format to view list of clients and filter by Access point

Report Fields:

- Unique ID & Client Full Name
- Project Start & Exit Date
- Disabling Condition
- Chronically Homeless Status
- Access Point
- Residence Prior to Entry
- Current Living Situation
- Custom FCES Entry Questions
- Family Bed Reservation Assessment (summary)
 - Is your household willing to go to a shelter anywhere in Orange County?
 - SPA
- Family Bed Reservation Assessment (summary cont)
 - Felony History
 - Registered Sex Offender
 - Open Warrant
 - Any Special Accommodations
 - Family Composition
 - City Ties
 - Shelter Preferences
 - Service Animals/Emotional Support Animals
- Count of Adults and Children
- Total Household Members

ICES Households Waiting for Bed Reservation

Export in CSV format to view list of clients and filter by Access point

Report Fields:

- Added Date
- Unique ID & Client Full Name
- Gender
- Project Start & Exit Date
- Disabling Condition
- Access Point
- Chronically Homeless Status
- Approximate Date of Homelessness Start
- City Prior to Entry
- Current Living Situation
- Individual Bed Reservation Assessment
 - Felony History
 - Registered Sex Offender
 - Open Warrant
 - Any Special Accommodations
 - Shelter Preferences
 - Service Animals/Emotional Support Animals
- Count of Adults

CES Homelessness Prevention Waitlist



Use these reports to see all clients on the CES Homelessness Prevention Waitlist

- This report will list all clients in both Individual and Family Coordinated Entry queue who are in need of homelessness prevention assistance

Agency: County of Orange/Family Solutions Collaborative

Report Location: Reports > Data Analysis > OC Clarity System Reports > Coordinated Entry



CES Homelessness Prevention Waitlist

Export in CSV format to view list of clients and filter by Access point

Report Fields:

- Client Unique ID
- Client Full Name
- Project Name
- Project Start Date
- Project Exit Date
- Access Point
- Assessment Score
- City
- Rental History/Tenant Information
- Eviction History
- Felony History
- Employment History
- Household Demographic Fields (Seniors, Dependent Children)
- Domestic violence or abuse in household (Yes / No)
- Household is under 50% AMI (Yes / No)
- Someone in the household has a mental or physical disability and/or circumstances that affect housing (Yes / No)
- Rental and/or utility arrears (Yes / No)

CES Moving On and Stepping Up Community Queue

Report Fields:

- Client Unique ID
- Client Full Name
- Current Age
- Veteran Status
- Disabling Condition
- Any Disability
- Assessment Name
- User Home Agency
- User Creating
- Assessment Date
- Assessment Score
- Days Since Referral Added to Queue
- Status
- Housing & Homelessness - Sleep Most Frequently
- What city were you in immediately prior to entry into this project?
- City
- Access Point



Community Queue List Maintenance

Data Entry: Needs Bed Reservation Assistance Service

Use this report to determine if a clients needs a new Needs Bed Reservation Assistance service entry to remain active on the Bed Reservation Waitlist

Agency: County of Orange/Family Solutions

Collaborative

Report Location: Reports > Data Analysis > OC Clarity System Reports > Bed Reservation

- FCES Data Entry: Needs Bed Reservation Assistance Service
- ICES Data Entry: Needs Bed Reservation Assistance Service



Data Entry: Needs Bed Reservation Assistance Service



Report Fields:

- Client Unique ID & Full Name
- Access Point
- Program Name
- Project Start Date
- Project Exit Date
- Service Start Date
- Service End Date
- Last Attendance Date



CES Data Entry: Needs Prevention Assistance Service

Use this report to determine if a clients needs a new Needs Prevention Assistance service entry to remain active on the Homelessness Prevention Coordinated Entry Waitlist

Agency: County of Orange/Family Solutions Collaborative

Report Location: Reports > Data Analysis > OC Clarity System Reports > Coordinated Entry



CES Data Entry: Needs Prevention Assistance Service



Report Fields:

- Client Unique ID & Full Name
- Programs Full Name
- Enrollments Project Start Date
- Enrollments Project Exit Date
- Access Point
- Assessment Score



CES Clients Active with Service Provider & on CES CQ

Use this report to review clients enrolled in CES with an active enrollment at your agency

Agency: Service Provider's Agency

Report Location: Reports > Data Analysis > OC Clarity System Reports > Coordinated Entry



CES Clients Active at Agency on CES CQ



Report Fields:

- Client Unique ID & Full Name
- Service Provider Project Name
- Service Provider Project Type
- Service Provider Enrollment Start & Exit Date
- Current Age
- Veteran Status
- On CES CQ (Yes/No)
- Date Added to CQ
- Last Activity Date
- Assessment Date
- Assessment Name
- RRH/PSH/HCV (Yes/No)



Housing Opportunities and Matches



CES Available Housing Opportunities

Housing Providers can use this report to determine if they have added the appropriate housing opportunity for CES

- Agency Name Filter

Agency: Housing Provider's Agency

Report Location: Reports > Data Analysis > OC Clarity System Reports > Coordinated Entry



CES Available Housing Opportunities

Export in Excel/CSV format to view list of agencies/projects.

Report Fields:

- Agency Name
- Name
- Project Type Code
- Note
- City Preference
- Program Opening Date
- Opportunity is for Family CES (Y/N)
- Opportunity is for Individual CES (Y/N)
- Opportunity is for Veteran CES (Y/N)
- Opportunity is for Transition Aged Youth (TAY)
- Housing Opportunity SPA
- Added Date
- Program Opening ID number
- Program Openings Count



CES Pending Households Matched to Housing Opportunities

Housing Providers can use this report to review pending referrals to an agency's housing opportunities

- Referto Programs Agency Name Filter

Agency: Housing Provider's Agency

Report Location: Reports > Data Analysis > OC
Clarity System Reports > Coordinated Entry



CES Pending Households Matched to Housing Opportunities

Export in Excel/CSV format to view list of clients

Report Fields:

- Unique ID
- Client Full Name
- Agency Name
- Project Name
- Project Type Code
- Date Referral was Reassigned
- Referring Agency
- Status
- Days Since Referral Added to Queue
- Last Updated Date
- In Process Date
- Program Opening ID number
- Housing Opportunity SPA
- Opportunity is for Family CES (Y/N)
- Opportunity is for Individual CES (Y/N)
- Opportunity is for Veteran CES (Y/N)
- Opportunity is for Transition Aged Youth (TAY)
- Care Team Agencies

[RFRL - 103] Referral Statistics Inbound

Use this report to review the status of referrals

- Pending
- Pending In Process
- Completed
- Expired
- Denied

Agency: Housing Provider's Agency

Report Location: Reports > Reports Library > Community and Referrals



[RFRL - 103] Referral Statistics Inbound

Export in PDF format to view aggregate data

Report Sections/Fields:

“Pending Referrals” and “Pending in Process Referrals”

- Number of referrals
- Oldest referral in days
- Newest referral in days
- Average referral in days

“Completed Referrals”, “Expired Referrals”, and “Denied Referrals”

- Number of referrals
- Longest time in days
- Shortest time in days
- Average time in days

“Breakdown of the Most Common Denied Referral Reasons”

- Client did not show up or call
- Client previously received service
- Client refused services
- Lack of Eligibility
- Needs could not be met by program
- Referral time expired
- Self Resolved - Client Housed
- Other

“Breakdown of Referred to Programs”

- Breakdown of referrals by Program Type



Common Data Quality Concerns

Conducting CES Intake/Assessments

Accurate and complete data collection is critical to ensure clients are appropriately matched to the housing opportunities they are eligible for. Access Point staff should review the intake and assessments to get a better understanding of the questions to assist clients with accurate data collection.

Please share this message with the clients prior to conducting intake.

- Information you share with us in these questions is valuable and important. This information helps us connect you to services and housing. The information about your living situation, disabling conditions, city of last permanent housing and the city where you were last night are very important because they help us understand your service and housing needs and eligibility



CES Common Data Quality Issues Dashboard



The dashboard includes the following reports:

- Approx. Date Homelessness Started/Episodes of Homelessness Inconsistencies
- Missing Current Living Situation
- Current Living Situation Older Than 90 Days
- Inconsistent Prior Living Situation & Current Living Situation
- CQ Referrals not from CES Lead
- Non-HoHs on the Community Queue
- HoHs without Contact Info

Agency: County of Orange/Family Solutions Collaborative

Report Location: Reports > Data Analysis > OC Clarity System Reports > Coordinated Entry



Approximate Date Homelessness Started & Episodes of Homelessness

The approximate date homelessness started should represent the client's most recent experience of homelessness

The field Number of times the client has been on the streets, in ES, or SH in the past three years is collected to represent the episodes of homelessness a client experiences



Approximate Date Homelessness Started & Episodes of Homelessness

Common error: Client reports a date that is 3+ years before project start and reported more than 1 episode of homelessness, or episodes of homelessness is missing

- If the approximate date of homelessness is accurate and there has been no break in homelessness, the episode of homelessness should be 1
- If there has been breaks between homelessness and the episodes of homelessness is accurately representing the breaks, the approx date must be correct to the latest date of homelessness experience



Approx. Date Homelessness Started/Episodes of Homelessness Inconsistencies

Report Fields:

- Approximate Date Homelessness Started Date
- Times Homeless in the Past Three Years
- Access Point
- Project Name
- Project Start Date
- Project Exit Date
- Days between Approx. Homeless Start Date and Project Start



Current Living Situation Assessment

The [Current Living Situation \(CLS\)](#) assessment is required for all Heads of Households and Adults enrolled in Coordinated Entry System

- The first CLS record must be recorded upon enrollment. The assessment date should match the client's Project Start Date and the information about the client's living situation should match the information given on the enrollment page regarding the client's living situation immediately prior to Project Start.
- A new CLS is record when the client's living situation changes or the CLS is older than 90 days



Missing Current Living Situation

Report Fields:

- Client Unique ID
- Client Full Name
- Current Age
- Veteran Status
- Access Point
- Project Name
- Project Start Date
- Project Exit Date
- User Creating
- Count Current Living Situation Assessment = 0



Current Living Situation Older Than 90 Days

Report Fields:

- Client Unique ID
- Client Full Name
- Current Age
- Veteran Status
- Access Point
- Project Name
- Project Start & Exit Date
- Information Date
- Current Living Situation (CLS)
- User Creating CLS



Inconsistent Prior Living Situation & Current Living Situation

Report Fields:

- Client Unique ID
- Client Full Name
- Current Age
- Veteran Status
- Access Point
- Project Name
- Project Start & Exit Date
- Residence Prior to Entry
- User Creating Enrollment
- Information Date
- Current Living Situation (CLS)
- User Creating CLS



Referring Agency is Not County of Orange or Family Solutions Collaborative

Errors of referrals completed by another agency other than County of Orange/Family Solutions Collaborative (FSC) is due to when a user is opening multiple tabs and switching between their agency access

- Inform the CES Leads to support with removing the referral
- Ensure you switch agency access to County of Orange/FSC and complete the assessment/referral
- Best practice: complete the workflow before navigating to another screen



CQ Referrals not from CES Lead

Report Fields:

- Client Unique ID
- Client Full Name
- Veteran Status
- Current Age
- Project Name
 - Individual CES
 - Family CES
- Project Start Date
- Project Exit Date
- Referring Agency
- User Creating Referral



Non-HoHs on the Community Queue

Report Fields:

- Client Unique ID
- Client Full Name
- On CES CQ (Yes/No)
- Added to CQ Date
- Last Activity Date
- User Creating Referral
- Project Name
 - Individual CES
 - Family CES
- Access Point



Reassigning Head of Household

Navigate to the client's CES enrollment and edit the Head of Household (HoH)

Correct the other members' relationship to the HoH to reflect each individual's relationship to the newly designated HoH

Homer Simpson

PROFILE HISTORY PROGRAMS ASSESSMENTS FILES SERVICES CONTACT LOCATION

SEARCH CASELOAD

The enrollment does not have an active Head of Household. Assign a new Head of Household to maintain compliance.

PROGRAM: COORDINATED ENTRY SYSTEM

Enrollment History Assessments Goals Notes Files Forms X Exit

Enroll Program for client Homer Simpson

Project Start Date 12/29/2022

PRIOR LIVING SITUATION

Type of Residence Place not meant for habitation (e.g., a vehicle, an abandoned building, bu...

Length of Stay in Prior...

33 DAYS ACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 12/29/2022

Assigned Staff: Armando Salazar

Head of Household: Marge Simpson

Program Group Members +

Marge Simpson	12/01/2022
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33 DAYS ACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 12/29/2022

Assigned Staff: Armando Salazar

Head of Household: Marge Simpson

CHANGE HEAD OF HOUSEHOLD

Marge Simpson Head of household's spouse

Homer Simpson Self (head of household)

SAVE CHANGES CANCEL

No Statuses

Assessment due every year
Notification: OFF

HoHs without Contact Info

Report Fields:

- Client Unique ID
- Client Full Name
- Project Name
 - Individual CES
 - Family CES
- Project Start & Exit Date
- Access Point
- User Creating



Updating Client Contact Information

Please ensure that all clients on the community queue have updated and accurate contact information. If the client does not have an email or phone number, the current case manager or alternate contact information should be added.

Knowledge Base Article: [Client Contact Information](#)

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

CLIENT CONTACTS

ADD CONTACT (+)

ADD CONTACT

Contact Type Client

Email

Phone (#1) XXX-XXX-XXXX

Phone (#2) XXX-XXX-XXXX

Active Contact

Private

Contact Date

Note

B *I*  

SAVE CHANGES

CANCEL

Resources



- [CES Reports article](#)
- [CES/Bed Reservation knowledge base](#)
- [CES Cheat Sheets](#)
- [Running a Saved Look article](#)
- [Running HMIS Canned Reports](#)
- [HMIS CES Training](#)

**Thank you &
have a great day!**

Please enter your agency name in the chat box