SAN DIEGO
Regional Task Force on the Homeless

Frequently Asked Questions: CES Transition

Coordinated Entry System (CES) Transition dates are between **12/23/2018 - 2/12/2019**. During this time period no new CES entries will be created and no new VI-SPDATs will be entered into the HMIS.

ServicePoint Access

1. Will HMIS users have access to ServicePoint during the transition period?
    a. No. For a majority of HMIS Users access to ServicePoint will stop on 1/1/2019. Access to Clarity will begin on 1/4/2019 but CES will not functional till 2/12/2019.

Upcoming Trainings

1. Are there dates and times set for the upcoming Coordinated Entry System (CES) trainings?
    a. The CES team will host trainings on February 5, 6, and 7th. Times and location will be emailed to all HMIS users. Also, all updates will be posted on the www.rtfhsd.org calendar of events.

VI-SPDAT questions

1. Will VI-SPDAT assessments be available after 1/4/2019?
    a. Not in HMIS. VI-SPDAT assessments will not be entered into the HMIS because the CES project will not exist until 2/12/2019.
2. Does the RTFH recommend that agencies complete a paper VI-SPDAT during the transition from 12/23/2018 - 2/12/2019?
    a. No. Since CES is not an emergency solution or a guarantee for housing the RTFH recommends practicing diversion conversations and referring clients to resources outside of the system.

3. What about programs who's funding requires completing VI-SPDATs?
    a. The RTFH recommends completing paper VI-SPDATs during the transition.
4. Can paper VI-SPDATs be entered once the transition period is over and CES is accessible in HMIS?
    a. Yes, the paper VI-SPDATs can be entered into Clarity, yet the new workflow will require a client to fill out additional assessment questions to be considered for prioritization.
5. If paper VI-SPDAT's are used, is there a system in place to get the information to RTFH during the transition?
    a. If a client with a compelling case (ex. has lived in riverbed for 10 years but due to medical condition is looking for assistance etc.) then you can bring the client information to one of the regularly scheduled case conferencing meetings.
6. Will we be able to access CES in HMIS to check VI-SPDAT scores and other CES information during the transition period?
    a. Users will be unable to check CES data because, for a majority of HMIS users, ServicePoint access will stop on 1/1/2019 and CES will not be available in Clarity till after 2/12/2019. However, CES will continue to have access and provide you with any information that is needed. Please email requests to support@rtfhsd.org.
7. Can the Match Initiation Form (MIF) be completed during the transition period?
    a. No. During the transition period no information will be entered into CES via the HMIS. Note: The MIF will no longer be an assessment in the new CES workflow.
8. Will the three unique VI-SPDATs exist in Clarity (Single, Family, and Transitional Aged Youth TAY)?
    a. Yes the three unique VI-SPDATs will exist in Clarity.
9. What if a client has multiple VI-SPDAT scores?
    a. Only the most recent VI-SPDAT will be migrated over to Clarity.

Uploaded Documents

Uploaded files in ServicePoint, such as the MPA, Driver's License, Social Security, DD-214s, etc. will not migrate over to Clarity. **The CES team realizes the importance of client documentation. We commit to manually uploading documents for the top 750-1,000 clients on the BNL (based on sub-population)**.

1. Once Clarity goes live will files need to be uploaded into Clarity?
    a. Clarity will have the capability to upload files to a client profile. Note: Obtaining an MPA in Clarity is simpler and clients can use a mouse or touch screen to electronically sign.
2. What was the reason to exclude client documentation?
    a. Only information entered into a data point/field can be transferred between systems. Since uploaded documents are PDFs, and not a data point, they are unable to be migrated over.

By-Name-List (BNL)

The By-Name-List during the transition period will be used to match clients to programs which need referrals. The By-Name-List is comprised of "active" clients who have the following:

1. An open CES entry AND
2. A definite "touch[1]" within 90 days (9/23/2018 - 12/23/2018)

The By-Name-List during the transition period is pulled by the RTFH staff from ServicePoint and provided at case conferencing.

The By-Name-List after 2/12/2019 - will be pulled from Clarity and accessible in Clarity to service providers.

[1] A definite "touch" can be one of the following:
An entry into any program after 9/23/2018
An interim review created after 9/23/2018
A service transaction created after 9/23/2018

1. What if a client isn't on the BNL?
    a. Clients may not be on the active BNL during the transition but their information will be in Clarity. If the client is not on the BNL but has a critical need for housing, RTFH recommends presenting the client's information during case conferencing.
2. If a client is still waiting for a Housing Navigator (HN) will that affect them on the BNL?
    a. No. Any client who is active will go onto the BNL and be considered for matching.
3. How will providers, housing navigators, and outreach workers know to attend case conferencing when your client is up next?
    a. RTFH will contact staff who have been in contact with prioritized clients.

Prioritization

HUD requires prioritization be based on a specific and definable set of criteria that are made publicly available through the CoC's written standards and must be applied consistently throughout the CoC.

The preliminary prioritization that will inform matching is as follows: Chronicity, length of time homeless, needs (such as families with small children, medical, sub-population etc.) and VISPDAT score. The prioritization guidelines can be found in the CES Policies and Procedures (last updated on January 23, 2018).

1. After reviewing San Diego's prioritizations: Does that mean chronicity is double weighted since chronicity is determined by length of time homeless?
    a. No. All the factors will be taken into account when prioritizing clients. The decision making will take place between persons or agencies working with the client(s) and the Housing Provider during case conferencing.
2. Does positive or negative stays at a shelter effect client's prioritization for permanent housing? For example if a client is kicked out of a shelter will that lower the client's chance of getting permanent housing?
    a. No. The prioritization does not account for behavior at a program or require clients to be enrolled in other programs.

3. Are we going to be using the prioritization standards immediately?
    a. Yes. Case conferencing will begin the week of January 7th, 2019 and the prioritization will guide who is referred to available housing resources.
4. Are we going to be using the prioritization in every aspect of the crisis response system?
    a. Currently the prioritization only informs referrals to housing providers who receive HUD ESG & HUD CoC funds. The prioritization does not inform Emergency Shelters, Transitional Housing, etc.

Case Conferencing

During the transition period the CES team will host a weekly case conferencing meeting that will focus on matching clients to available housing resources. Case conferencing will consist of relevant staff from agencies who work with the prioritized clients and housing providers who have vacancies to fill. During these meetings, prioritization will guide who is referred but the decision will ultimately be made by the group of present providers, not solely the RTFH.
After the transition period, the CES department will host 4 regularly scheduled case conferencing meetings: 1. Resource sharing; 2. Advocacy; 3. Matching; 4. Inactivity.

1. Does the MPA cover the sharing of information between providers?
    a. The MPA and the NPP cover the sharing of client information for the purposes of housing and service collaboration. Only clients with a signed MPA will be discussed at Case Conferencing.
2. Will case conferencing only be for those in the trusted network? Can a volunteer attend?
    a. The Multi-Party Authorization (MPA) form currently applies to paid employees of the Trusted Network. In order to maintain and honor client confidentiality only employees involved with the client are covered by the MPA are able to attend case conferencing.

3. Will case conferencing replace HN meetings?
    a. During the transition period, the CES team will evaluate the need for ongoing housing navigation meetings and the best way to communicate CES information to the community.
4. Will case conferencing be regionally based? Or will everyone be at the same meeting?
    a. Since Match Case conferencing will be driven by available housing inventory and those next on the BNL, these meetings will likely be held in one central location. For region specific housing resources, region-based case conferencing can be scheduled.
5. Will providers be required to go to 4 extra meetings per/ month?
    a. Although participation in all case conferencing is highly encouraged, not all may be applicable for you or your client's need at the time.
6. Will participants be expected to show up in person?
    a. Participants are strongly encouraged to attend Case Conferencing in person during the transition period. As Case Conferencing evolves, the CES team is looking to provide electronic participation (ex. Teleconference, live-streaming, etc.)
7. Will general expectations at the Case Conferencing be offered by the RTFH?
    a. Yes. More information will be provided as case conferencing evolves.

Please be sure to check, and read, all incoming emails from the RTFH for further updates. Also, we encourage all HMIS users to frequently check the calendar on the RTFH website for upcoming trainings, events, and informational sessions.

Thank you!
The CES Team
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