



# 2020 CES Workflow Guide



SAN DIEGO  
Regional Task Force  
on the Homeless

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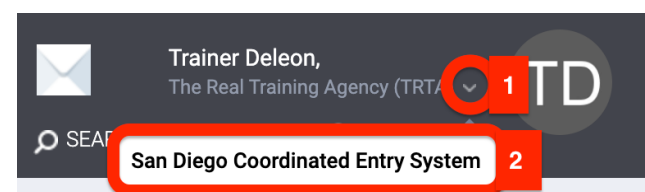
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# BEFORE ENROLLING A CLIENT INTO CES

Under the 2020 HUD CE Standards, households must be actively enrolled in at least two projects, one providing services and CES. Before you enroll a client into the Coordinated Entry System program please make sure that you are working with the client through one of your agency's programs. For example, if you work at an agency that provides outreach services and you encounter a client that seems appropriate for CES during an outreach session. You would want to make sure that you enroll this client into the appropriate Outreach program through your agency prior to enrolling the client into any CES program. Clients should always be enrolled in some other program that you are working with them through prior to enrolling the client into the CES program. Please do NOT create a CES enrollment for a client if you are not going to continue working with them in one of your agency's programs.

## ENROLLING A CLIENT IN CES

1. Switch into the San Diego Coordinated Entry System agency



2. Search for the Client using the search bar and navigate to the Client's profile

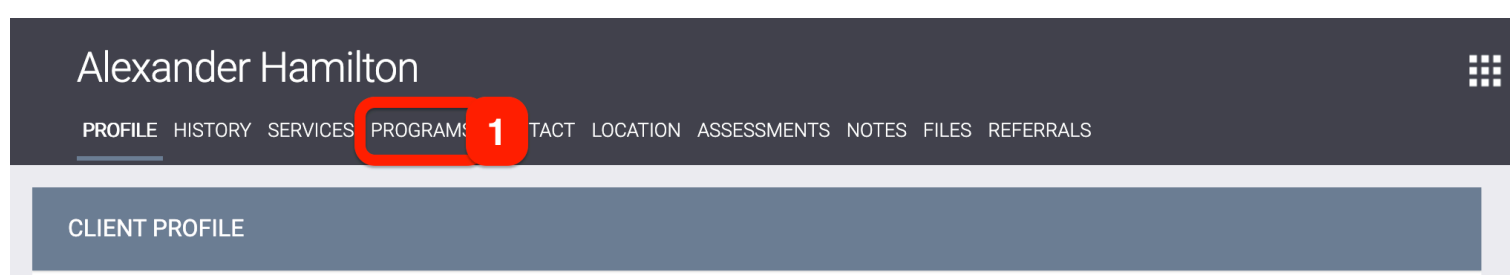
SEARCH FOR A CLIENT ADD CLIENT +

Alexander Hamilton 1 2 SEARCH

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

	Date of Birth	Last Four SSN	Last Updated
<span>3</span> Alexander Hamilton	01/11/1987	Age: 33 0000	12/02/2020

3. Click into the Programs tab



4. Click on the CES - CE - San Diego program under Programs Available

PROGRAMS: AVAILABLE

CES - CE - San Diego 1 ▼

- Toggle on any household members you want to include on this CES enrollment and then click “Enroll”

Include group members:

1 ☒ Elizabeth Hamilton Schuyler

PRINT DIRECTIONS

2 ENROLL

- Complete the Enrollment Screen fields with the client then click **Save & Next**

NON-CASH BENEFITS

Receiving Non-Cash Benefits No ▼

HEALTH INSURANCE

Covered by Health Insurance No ▼

1 SAVE & NEXT CANCEL

## COMPLETING A CURRENT LIVING SITUATION ASSESSMENT

- Switch into the San Diego Coordinated Entry System agency

Trainer Deleon,  
The Real Training Agency (TRTA) 1 ▼

SEARCH 2 San Diego Coordinated Entry System

- Search for the Client using the search bar and navigate to the Client’s profile

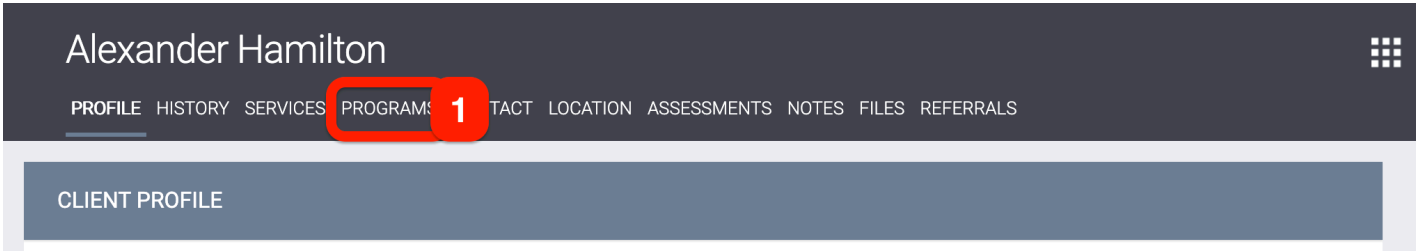
SEARCH FOR A CLIENT ADD CLIENT +

1 Alexander Hamilton 2 SEARCH

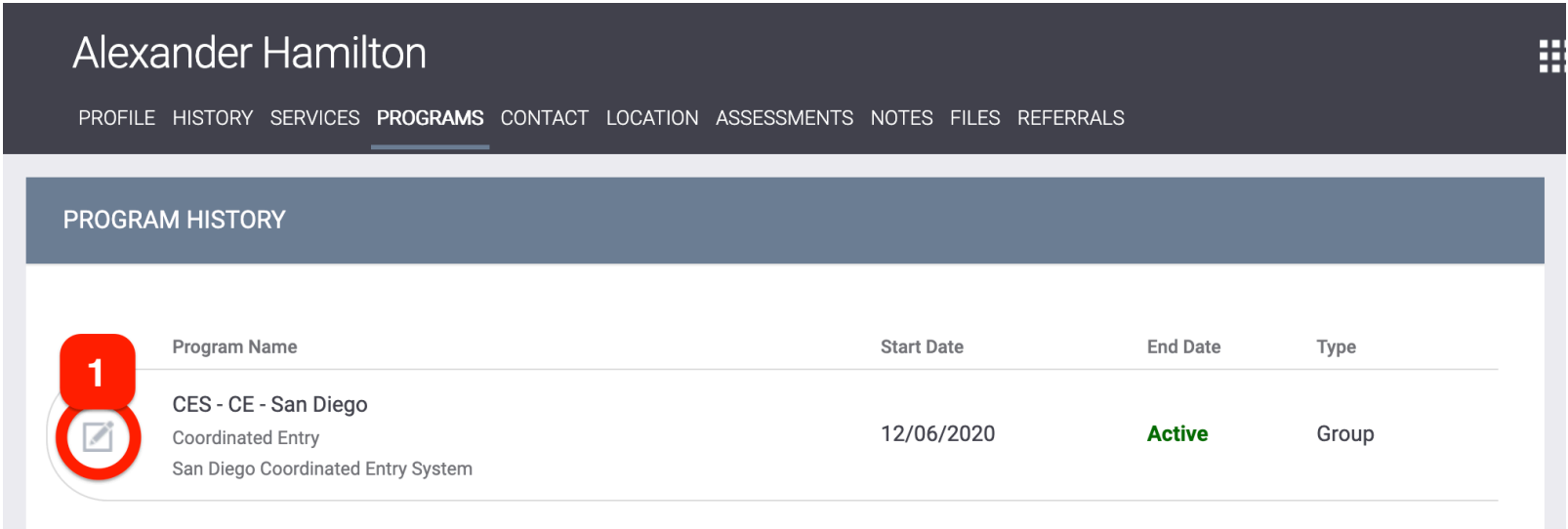
Use full name, partial name, date of birth or any combination.

	Date of Birth	Last Four SSN	Last Updated
<span style="border: 1px solid red; border-radius: 50%; padding: 2px 5px;">3</span> Alexander Hamilton	01/11/1987	Age: 33 0000	12/02/2020

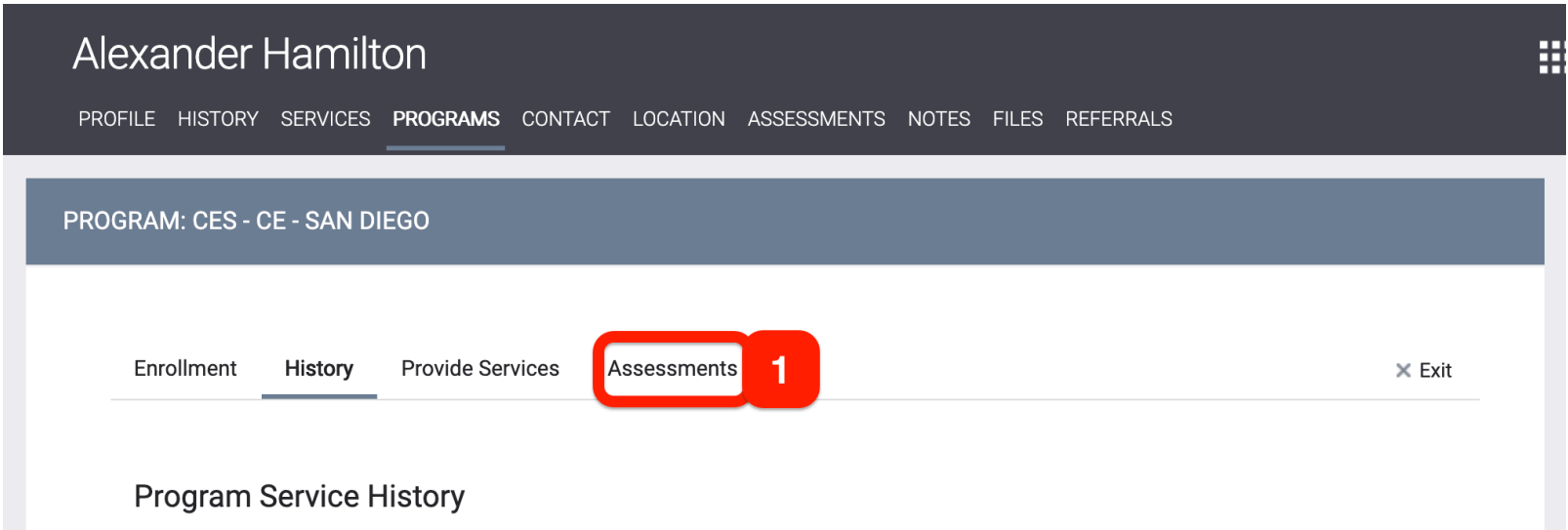
3. Click into the Programs tab



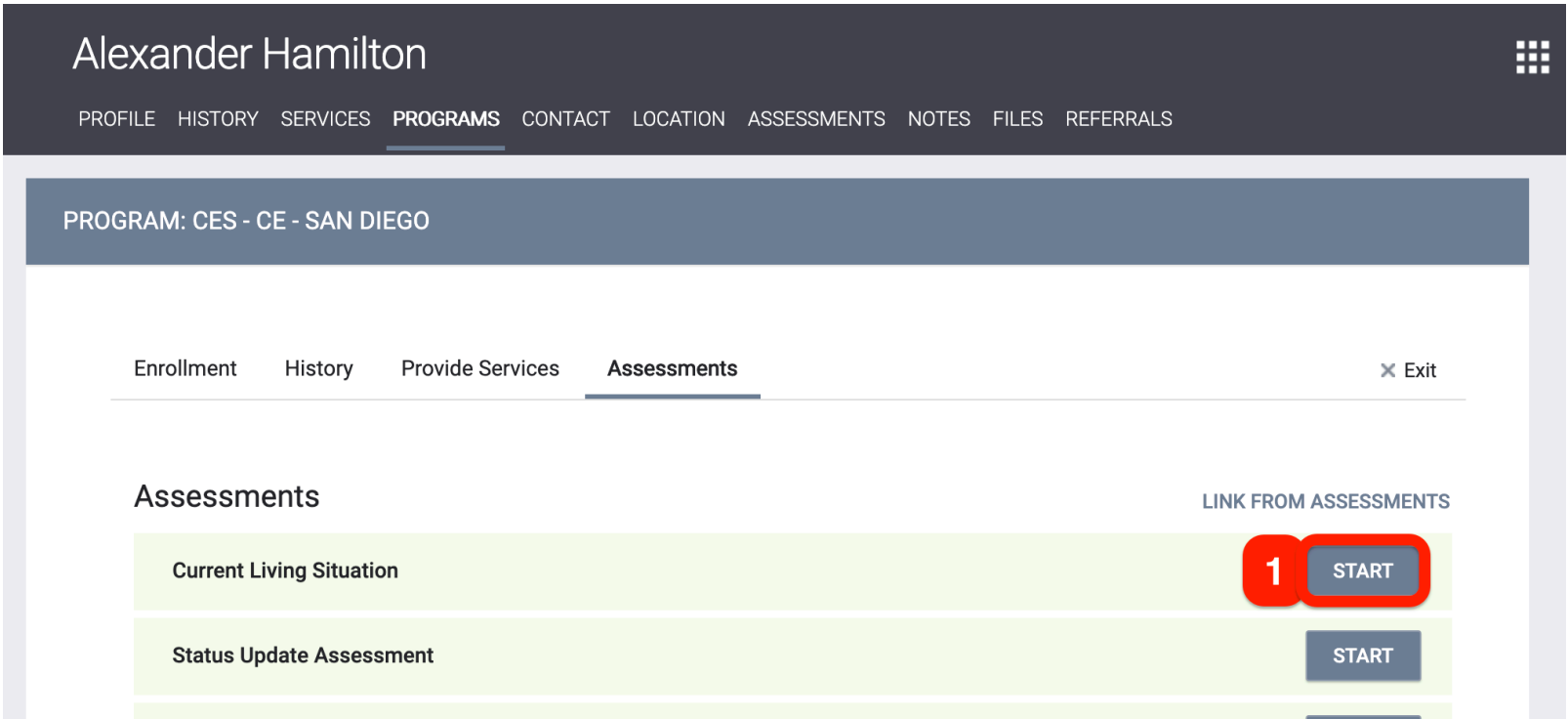
4. Click on the edit pencil corresponding to the active CES - CE - San Diego program enrollment



5. Click on the Program Assessments tab



6. Click on the Start button corresponding to the CLS assessment.



- Toggle on all household members you want to complete a CLS assessment for

ADD PROGRAM ASSESSMENT

1

Alexander Hamilton Husband

Elizabeth Hamilton Schuyler Wife

ADD CURRENT LIVING SITUATION 2

- Complete the CLS assessment with each client and then click **Save & Close** to finalize the record.

1 SAVE & CLOSE CANCEL

## COMPLETING A CES TRIAGE TOOL

- Switch into the San Diego Coordinated Entry System agency

Trainer Deleon,  
The Real Training Agency (TRT)

1

San Diego Coordinated Entry System 2

- Search for the Client using the search bar and navigate to the Client's profile

SEARCH FOR A CLIENT

ADD CLIENT +

1 Alexander Hamilton 2 SEARCH

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

	Date of Birth	Last Four SSN	Last Updated
3 Alexander Hamilton	01/11/1987	Age: 33 0000	12/02/2020

- Click into the Programs tab

Alexander Hamilton

PROFILE HISTORY SERVICES PROGRAMS 1 TACT LOCATION ASSESSMENTS NOTES FILES REFERRALS

CLIENT PROFILE

- Click on the edit pencil corresponding to the **active** CES - CE - San Diego program enrollment

Alexander Hamilton

[PROFILE](#)
[HISTORY](#)
[SERVICES](#)
[PROGRAMS](#)
[CONTACT](#)
[LOCATION](#)
[ASSESSMENTS](#)
[NOTES](#)
[FILES](#)
[REFERRALS](#)

PROGRAM HISTORY

1	Program Name	Start Date	End Date	Type
	CES - CE - San Diego Coordinated Entry San Diego Coordinated Entry System	12/06/2020	Active	Group

5. Click on the Program Assessments tab

Alexander Hamilton

[PROFILE](#)
[HISTORY](#)
[SERVICES](#)
[PROGRAMS](#)
[CONTACT](#)
[LOCATION](#)
[ASSESSMENTS](#)
[NOTES](#)
[FILES](#)
[REFERRALS](#)

PROGRAM: CES - CE - SAN DIEGO

[Enrollment](#)
[History](#)
[Provide Services](#)
[Assessments](#)
1
✕ Exit

Program Service History

6. Click on the Start button corresponding to the appropriate Triage Tool

Alexander Hamilton

[PROFILE](#)
[HISTORY](#)
[SERVICES](#)
[PROGRAMS](#)
[CONTACT](#)
[LOCATION](#)
[ASSESSMENTS](#)
[NOTES](#)
[FILES](#)
[REFERRALS](#)

[Enrollment](#)
[History](#)
[Provide Services](#)
[Assessments](#)
✕ Exit

Assessments

LINK FROM ASSESSMENTS

Current Living Situation	START
Status Update Assessment	START
Annual Assessment	START
CES Triage Tool for Families	START
CES Triage Tool for Single Adults	1 START
CES Triage Tool for Transitional Age Youth	START

7. Complete the CES Triage Tool with the client and click Save & Close to finalize the record.

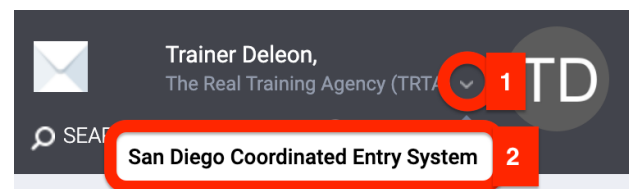
1

SAVE

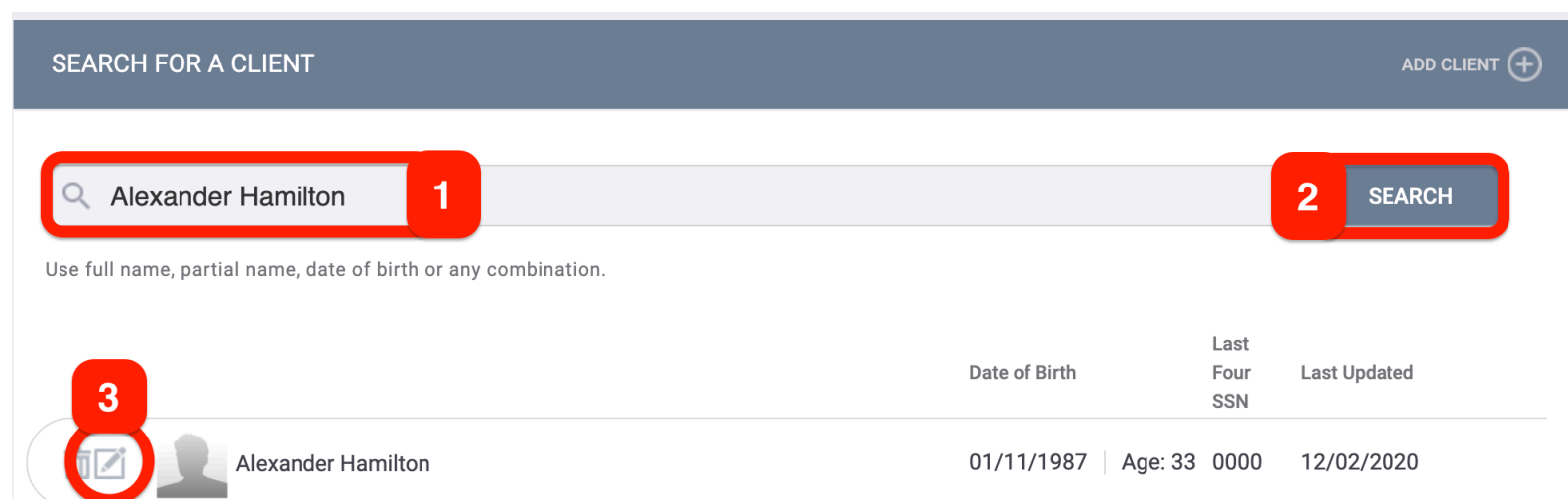
CANCEL

# REFERRING A CLIENT TO THE COMMUNITY QUEUE

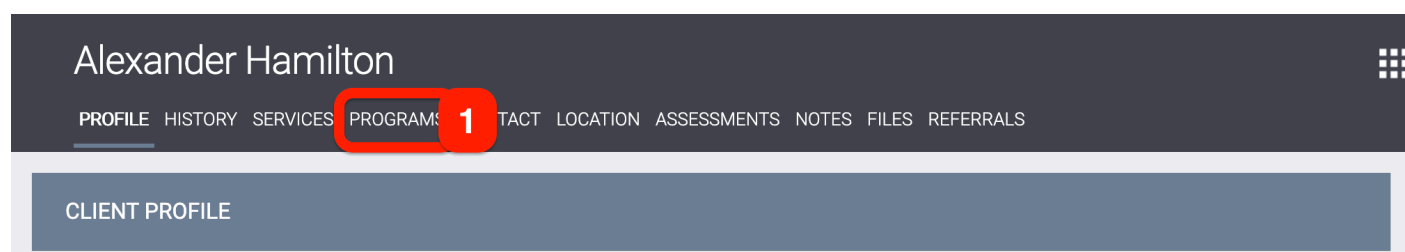
1. Switch into the San Diego Coordinated Entry System agency



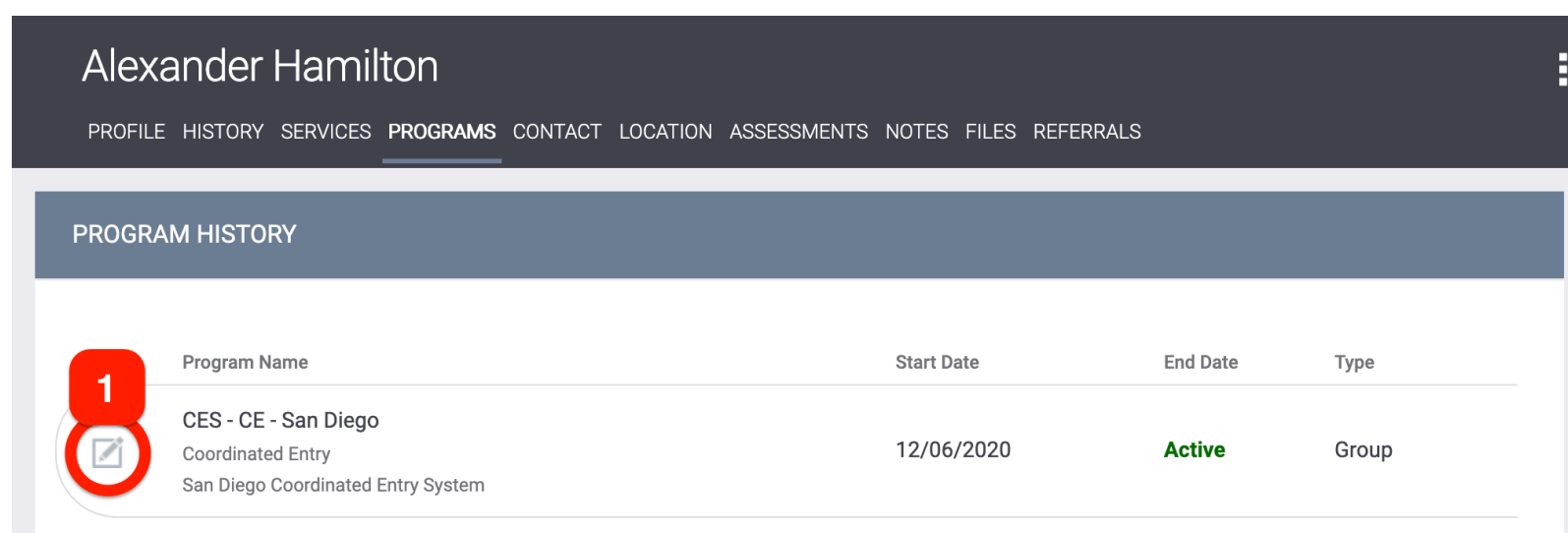
2. Search for the Client using the search bar and navigate to the Client's profile



3. Click into the Programs tab



4. Click on the edit pencil corresponding to the active CES - CE - San Diego program enrollment



5. Click on the Program Assessments tab



Alexander Hamilton

PROFILE

HISTORY

SERVICES

PROGRAMS

CONTACT

LOCATION

ASSESSMENTS

NOTES

FILES

REFERRALS

PROGRAM: CES - CE - SAN DIEGO

Enrollment

History

Provide Services

Assessments

1

Exit

Program Service History

- Scroll down to the Assessment History section and click on the eligibility button corresponding with the CES Triage Tool you want to use to refer the client to the community queue (Should be most recent Triage Tool in most cases).

ASSESSMENT HISTORY

Advanced Search Options View

Assessment Name	Completed	Details
CES Triage Tool for Single Adults San Diego Coordinated Entry System	12/06/2020	<div>VI-SPDAT-V2 : 3</div> <div>ELIGIBILITY</div> <div>1</div>
Current Living Situation San Diego Coordinated Entry System	12/06/2020	

☐ Other
 ☒ Status Assessment

- Click on the **Refer Directly to Community Queue** button

PROGRAM ELIGIBILITY DETERMINATION

VI-SPDAT-V2 Score Summary

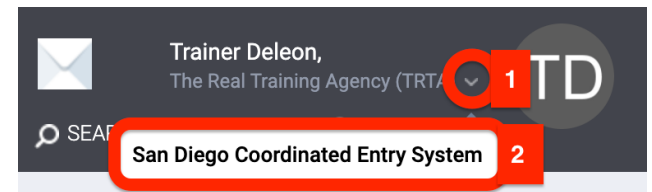
GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	0	RISKS	0
SOCIALIZATION & DAILY FUNCTION	3	WELLNESS	0
VI-SPDAT-V2 PRE-SCREEN TOTAL		3	

REFER DIRECTLY TO COMMUNITY QUEUE

1

# CHECK-IN A CLIENT'S REFERRAL TO THE COMMUNITY QUEUE

1. Switch into the San Diego Coordinated Entry System agency




2. Search for the Client using the search bar and navigate to the Client's profile

SEARCH FOR A CLIENT

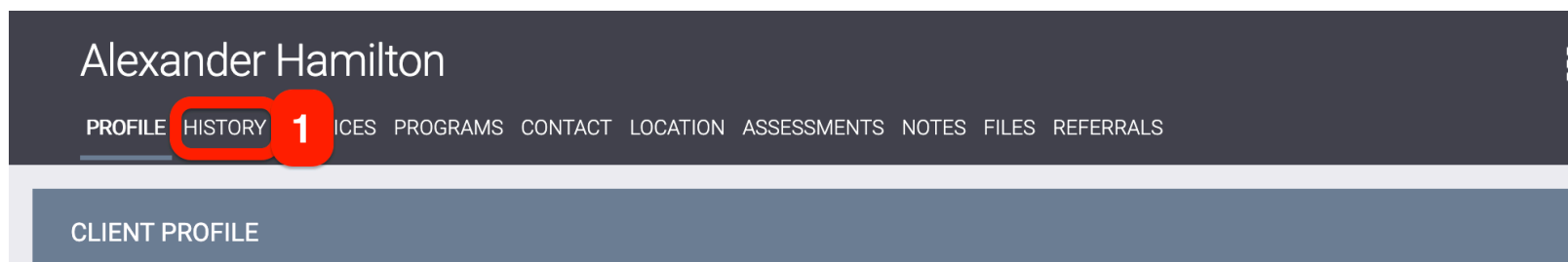
ADD CLIENT +

Alexander Hamilton

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

	Date of Birth	Last Four SSN	Last Updated
 Alexander Hamilton	01/11/1987	Age: 33 0000	12/02/2020

3. Click into the History tab




4. Click on the edit pencil corresponding with the client's referral to the Community Queue

Alexander Hamilton

PROFILE HISTORY SERVICES PROGRAMS CONTACT LOCATION ASSESSMENTS NOTES FILES REFERRALS

HISTORY

Advanced Search Options View

Service Name	Start Date	End Date
 <b>Referral: Community Queue</b> San Diego Coordinated Entry System referral to Community Queue	12/06/2020	<b>Pending</b>
CES Triage Tool for Single Adults San Diego Coordinated Entry System		12/06/2020
CES - CE - San Diego San Diego Coordinated Entry System	12/06/2020	<b>Active</b>

Program Service Referral Reservation Assessment

5. Click on the **Check-In** button

Alexander Hamilton

PROFILE HISTORY SERVICES PROGRAMS CONTACT LOCATION ASSESSMENTS NOTES FILES REFERRALS

Quarantined Yes

VI-SPDAT-V2 score 3

Last Activity 12/06/2020 **CHECK-IN 1**

Referred by Staff Trainer Deleon ⓘ

## TRACKING A CE EVENT THROUGH A PROGRAM SERVICE

1. Switch into the San Diego Coordinated Entry System agency

Trainer Deleon,  
The Real Training Agency (TRTA) **1**

SEARCH

**San Diego Coordinated Entry System 2**

2. Search for the Client using the search bar and navigate to the Client's profile

SEARCH FOR A CLIENT ADD CLIENT +

**1** Alexander Hamilton **2** SEARCH

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

<b>3</b>		Date of Birth	Last Four SSN	Last Updated
	Alexander Hamilton	01/11/1987	Age: 33 0000	12/02/2020

3. Click into the Programs tab

Alexander Hamilton

PROFILE HISTORY SERVICES **PROGRAMS 1** CONTACT LOCATION ASSESSMENTS NOTES FILES REFERRALS

CLIENT PROFILE

4. Click on the edit pencil corresponding to the **active** CES - CE - San Diego enrollment

Alexander Hamilton

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

PROGRAM HISTORY

<b>1</b>	Program Name	Start Date	End Date	Type
	CES - CE - San Diego Coordinated Entry San Diego Coordinated Entry System	12/06/2020	<b>Active</b>	Group

5. Click on the Provide Services tab

PROGRAM: CES - CE - SAN DIEGO

Enrollment History **Provide Services** Assessments × Exit

6. Click on the drop-down arrow for the Coordinated Entry Events Services

PROGRAM: CES - CE - SAN DIEGO

Enrollment History **Provide Services** Assessments × Exit

Services

Coordinated Entry Event **1** Coordinated Entry Event ▼

7. Select the appropriate Coordinated Entry Event Service and complete the required fields

Coordinated Entry Event Coordinated Entry Event ^

Problem Solving/Diversion/Rapid Resolution intervention or service **1** ▼

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 ▼

8. Click on **Submit** to finalize this service record.

**1** SUBMIT

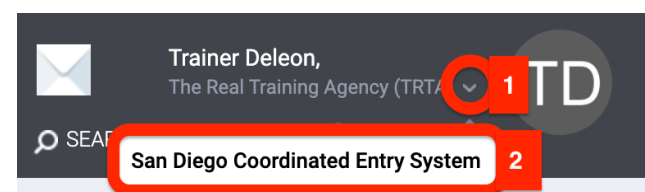
# WHEN SHOULD I EXIT A CLIENT FROM COORDINATED ENTRY

The 3.11 Project Exit Date represents the end of a client's participation with the CE system. The exit date should coincide with the date that the client is no longer considered to be actively seeking crisis or housing assistance from the CoC. Reasons to exit a client include:

1. The client has entered a permanent residential project type (e.g., PSH) or is otherwise known to have found permanent housing;
2. The client is known to have left the CoC to pursue other assistance or resources;
3. The client is deceased;
4. No staff working in the CE system (via appropriate case conferencing) has been able to locate the client for an extended length of time (e.g. 90 days from last contact) and there are no *Current Living Situation* records.

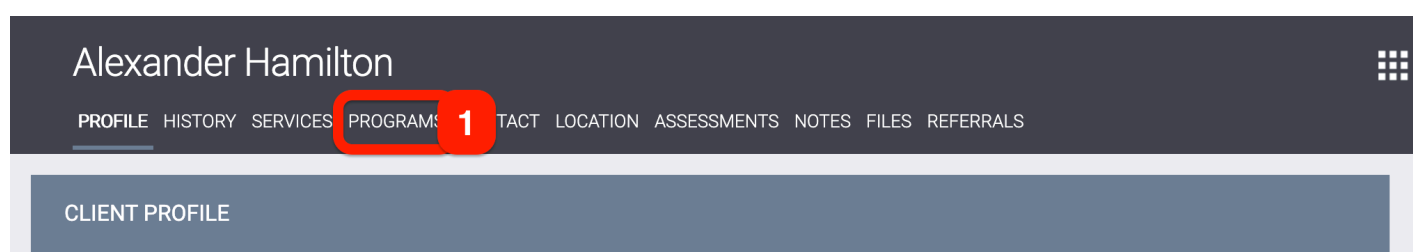
## EXITING A CLIENT FROM CES

1. Switch into the San Diego Coordinated Entry System agency



2. Search for the Client using the search bar and navigate to the Client's profile

3. Click into the Programs tab




- Click on the edit pencil corresponding to the **active** CES - CE - San Diego program enrollment

Alexander Hamilton

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

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
<b>1</b>  CES - CE - San Diego Coordinated Entry San Diego Coordinated Entry System	12/06/2020	<b>Active</b>	Group


- Click on the **X Exit** button

Alexander Hamilton

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


PROGRAM: CES - CE - SAN DIEGO

Enrollment **History** Provide Services Assessments

**1** 


Program Service History

- Toggle on any household members you want to exit from this CES - CE - San Diego program enrollment and then click **End Program**

**1** 

Alexander Hamilton Husband

Elizabeth Hamilton Schuyler Wife

**2** 

- Complete the Exit Screen fields with each client and then click **Save & Close**

**1**  

# CES WORKFLOW CHECKLIST

**IMPORTANT:** Your client should have a **program enrollment into your program** (ES, TH, SSO, outreach, day shelters, safe parking, safe havens projects, etc.) before completing the CES workflow.

## *Clarity Dashboard*

- ☐ Are you in the correct switch “San Diego Coordinated Entry System” agency? (Page 3)
  - You can switch into another agency under your name on the right-hand side in Clarity (HMIS).
  - You need to be in the “San Diego Coordinated Entry System” agency to complete the CES workflow for your client.

## *Look up your Client*

- ☐ Does your client already have a Clarity (HMIS) profile or will you have to create one? (Page 3)
  - Ensure you are not creating a duplicate HMIS profile for your client.
  - If you come across duplicate client profiles, contact support@rtfhsd.org and provide Clarity ID numbers.

## *Client Privacy*

- ☐ Did you create a Release of Information entry and attach a signed Multiparty Authorization form?
  - If so, get a new MPA for the client and upload it.
  - An ROI/MPA are one and the same, they last 7 years.

## *Client Profile*

- ☐ Once in your client’s profile click on “Programs” tab, scroll to the bottom and under the “Programs: AVAILABLE” banner the “CES – CE – San Diego” program exists. (Page 3)
  - If you don’t see the program the client may already have an CES-CE- San Diego program enrollment.
  - Work solely from the existing “Active” “CES – CE – San Diego” program.
- ☐ Click the arrow and scroll to the bottom and click on “ENROLL” button. (Page 4)
  - If you need to enroll other household members please ensure you toggle **all household members** to the CE program.
- ☐ Are the client’s “Enroll Program” section accurate? (Page 4)
  - Please ensure all data elements are up to date. Go over the information with your client.
- ☐ In the “Assessments” tab in the “CES-CE-San Diego” program complete the “**Current Living Situation**” assessment. (Page 4, 5, & 6)
- ☐ In the “Assessments” tab in the “CES-CE-San Diego” program complete the correct “**CES Triage Tool**” and refer the client to the Community Queue. (Page 6, 7, 8, & 9)
- ☐ In the “Provide Services” tab in the “CES-CE-San Diego” program complete the appropriate “**Coordinated Entry Event**” services that you have completed. (Page 11 & 12)

## *Contact Tab*

- ☐ Did you include contact information in the “Contact” tab or do you need to update client’s contact information?
  - Add a phone number and email or either one. If your client doesn’t have contact info as the Homeless Service Provider, you add yourself to the contact tab if you plan on working extensively with your client.

## *Maintain CE program enrollment & Community Queue referral*

- ☐ In the “Assessments” tab in the “CES-CE-San Diego” program complete the “Current Living Situation” assessment as the living situation changes or before **every 90 days** of the programs start date. (Page 4, 5, & 6)
- ☐ In the “History” tab in the Client profile click the edit pencil on the client’s referral to the Community Queue, click on the “Check-In” button. Complete before **every 90 days**. (Page 10 & 11)