

# The 2020 CES Workflow Process

September 16, 2020



# FY 2020 HMIS Data Standards Coordinated Entry Updates

HUD's most recent HMIS Data Standards require Coordinated Entry Systems to capture some new data elements.

## **4.20 Coordinated Entry Event**

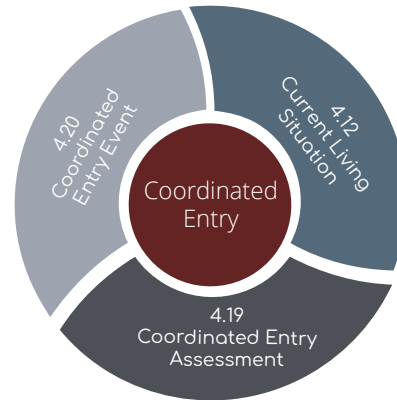
*Designed to capture key referral and placement events, as well as the results of those events.*

Basic interactions in CE systems are expected to be captured using the *CE Event* data element (4.20). This data element is designed to be used solely by CE projects and to capture access and referral events, as well as the results of those events.

# Overview of CE Workflow

The new CES Workflow will now be similar to most other programs in HMIS in that it will require a program enrollment, methods of tracking engagement within the program enrollment, and ultimately a program exit.

Emergency Shelter	Track Program Involvement
Street Outreach	Track Services
Supportive Services	Broadening Homeless Service Network
Other HMIS Programs	HUD Mandated Data Collection (i.e. UDE's, PSDE's)



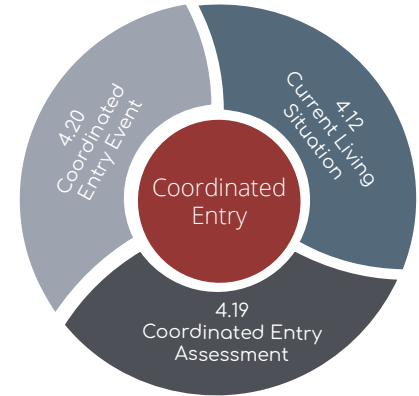
# New Workflow Pieces

The Coordinated Entry workflow is introducing two new interconnected processes.

First, is a program enrollment into the CE program. For this you will need to complete status assessments, in the form of a 4.12 Current Living Situation; program assessments, in the form of 4.19 Coordinated Entry Assessments; and program services, in the form of 4.20 Coordinated Entry Events.

Second, is the Community Queue. The Community Queue is connected to the CE program enrollment because a referral to the Community Queue can only be made after completing a 4.19 Coordinated Entry Assessment, specifically you would need to complete the CES Triage Tool. The Community queue is also necessary to track certain CE Events in our community.

CE Program Enrollment



Community Queue



1

2

3

4

5

6

7

**Your Service Provider Workflow**

**Enrollment into Coordinated Entry program**

**Complete a Current Living Situation Assessment**

**Complete a CES Triage Tool**

**Referral to the Community Queue and Check In**

**Tracking CE Events through a program service**

**Exit from Coordinated Entry program**

All clients that are entered into Coordinated Entry should already be enrolled in a program in HMIS.

3.10 Project Start Date should be the date that you started working with the client towards attaining housing.

4.12 Current Living Situation is required to be collected anytime any of the following occurs ...

This 4.19 Coordinated Entry Assessment informs prioritization from the Community Queue.

This 4.20 Coordinated Entry Event will result in a client being visible on the Community Queue.

Some 4.20 Coordinated Entry Events will need to be recorded through a program service.

The 3.11 Project Exit Date should be the date that ...

## Your Service Provider Workflow

All clients that are entered into Coordinated Entry should already be enrolled in a program in HMIS.

Prior to entering a client into the Coordinated Entry System they should already have a program enrollment into one of your agency's program's (i.e. there should be some interaction recorded in HMIS even if CES wasn't an option).

The screenshot displays the user interface for 'The Real Training Agency (TRTA)'. At the top, the agency name is shown on the left, and the user's name 'Trainer Deleon, The Real Training Agency (TRTA)' is on the right. Below the agency name is a search bar labeled 'SEARCH FOR A CLIENT' with an 'ADD CLIENT +' button. The search bar contains the placeholder text 'Enter search terms for a client' and a 'SEARCH' button. Below the search bar, there is a reminder: '\*\*REMINDER: THIS IS THE CLARITY TRAINING SITE. DO NOT ENTER INFO ON REAL CLIENTS. Share your feedback on Clarity/HMIS New User Training here: <https://www.surveymonkey.com/r/hmisisnewuser>'. To the right of the search bar, there is a section titled 'Your recent client searches:' with a list of names: Greg Brady, Jan Brady, Marcia Brady, Carol Brady, and Mike Brady. The name 'Marcia Brady' is highlighted with a mouse cursor. At the bottom left of the interface, it says 'Managed with Clarity Human Services'.

1

2

3

4

5

6

7

**Your Service Provider Workflow**

**Enrollment into Coordinated Entry program**

**Complete a Current Living Situation Assessment**

**Complete a CES Triage Tool**

**Referral to the Community Queue and Check In**

**Tracking CE Events through a program service**

**Exit from Coordinated Entry program**

All clients that are entered into Coordinated Entry should already be enrolled in a program in HMIS.

3.10 Project Start Date should be the date that you started working with the client towards attaining housing.

4.12 Current Living Situation is required to be collected anytime any of the following occurs ...

This 4.19 Coordinated Entry Assessment informs prioritization from the Community Queue.

This 4.20 Coordinated Entry Event will result in a client being visible on the Community Queue.

Some 4.20 Coordinated Entry Events will need to be recorded through a program service.

The 3.11 Project Exit Date should be the date that ...

## Enrollment into Coordinated Entry program

3.10 Project Start Date should be the date that you started working with the client towards attaining housing.

You will need to switch into the San Diego Coordinated Entry System agency, and enroll the client into the CES - CE - San Diego program.

The Real Training Agency (TRTA)

Trainer Deleon, The Real Training Agency (TRTA) TD

SEARCH San Diego Coordinated Entry System

SEARCH FOR A CLIENT ADD CLIENT +

Enter search terms for a client SEARCH

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

**\*\*REMINDER: THIS IS THE CLARITY TRAINING SITE. DO NOT ENTER INFO ON REAL CLIENTS.**  
Share your feedback on Clarity/HMIS New User Training here: <https://www.surveymonkey.com/tr/hmisnewuser>

Managed with Clarity Human Services

Your recent client searches:

- Ash Ketchum
- Greg Brady
- Jan Brady
- Marcia Brady
- Carol Brady

<https://sandiego-train.clarityhs.com/referral>



1

2

3

4

5

6

7

### Your Service Provider Workflow

### Enrollment into Coordinated Entry program

### Complete a Current Living Situation Assessment

### Complete a CES Triage Tool

### Referral to the Community Queue and Check In

### Tracking CE Events through a program service

### Exit from Coordinated Entry program

All clients that are entered into Coordinated Entry should already be enrolled in a program in HMIS.

3.10 Project Start Date should be the date that you started working with the client towards attaining housing.

4.12 Current Living Situation is required to be collected anytime any of the following occurs ...

This 4.19 Coordinated Entry Assessment informs prioritization from the Community Queue.

This 4.20 Coordinated Entry Event will result in a client being visible on the Community Queue.

Some 4.20 Coordinated Entry Events will need to be recorded through a program service.

The 3.11 Project Exit Date should be the date that ...

## Complete a Current Living Situation Assessment

4.12 Current Living Situation is required to be collected anytime any of the following occurs:

1. A Coordinated Entry Assessment or Coordinated Entry Event is recorded; or
2. The client's living situation changes; or
3. If a Current Living Situation hasn't been recorded for longer than a community-defined length of time (i.e. longer than 90 days). The CoC must be involved in the determination of "community-defined length of time;" or
4. Project Start

For Coordinated Entry projects, record a Current Living Situation anytime any of the following occurs: (1) A Coordinated Entry Assessment or Coordinated Entry Event is recorded; or (2) The client's living situation changes; or (3) If a Current Living Situation hasn't been recorded for longer than a community-defined length of time (i.e. longer than 90 days). The CoC must be involved in the determination of "community-defined length of time;" or (4) Project Start

**Ash Ketchum**

PROFILE HISTORY SERVICES PROGRAMS CONTACT LOCATION ASSESSMENTS NOTES FILES REFERRALS

Trainer Deleon, San Diego Coordinated Entry System TD

SEARCH CASELOAD

Your changes have been saved successfully.

PROGRAM: CES - CE - SAN DIEGO

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	START
CES Triage Tool for Transitional Age Youth	START

**0 DAYS ACTIVE PROGRAM**

Program Type: Individual

Program Start Date: 09/16/2020

Assigned Staff: Trainer Deleon

Head of Household: Ash Ketchum

**Program Group Members**

No active members

**Status Assessments** +

No statuses

Assessment due every year  
Notification: ON

ASSESSMENT HISTORY

Waiting for sandiego-train.clarityhs.com...

1

2

3

4

5

6

7

**Your Service Provider Workflow**

**Enrollment into Coordinated Entry program**

**Complete a Current Living Situation Assessment**

**Complete a CES Triage Tool**

**Referral to the Community Queue and Check In**

**Tracking CE Events through a program service**

**Exit from Coordinated Entry program**

All clients that are entered into Coordinated Entry should already be enrolled in a program in HMIS.

3.10 Project Start Date should be the date that you started working with the client towards attaining housing.

4.12 Current Living Situation is required to be collected anytime any of the following occurs ...

This 4.19 Coordinated Entry Assessment informs prioritization from the Community Queue.

This 4.20 Coordinated Entry Event will result in a client being visible on the Community Queue.

Some 4.20 Coordinated Entry Events will need to be recorded through a program service.

The 3.11 Project Exit Date should be the date that ...

The CES Triage Tool will be used in order to inform the prioritization process. Please make sure to complete the appropriate triage tool (i.e. Single Adults, Transition Age Youth, or Families).

## Complete a CES Triage Tool

This 4.19 Coordinated Entry Assessment informs prioritization from the Community Queue.

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

Trainer Deleon,  
 San Diego Coordinated Entry System

SEARCH CASELOAD

PROGRAM: CES - CE - SAN DIEGO

Enrollment History Provide Services **Assessments** X Exit

PROGRAM ELIGIBILITY DETERMINATION

**VI-SPDAT-V2 Score Summary**

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	0	RISKS	2
SOCIALIZATION & DAILY FUNCTION	2	WELLNESS	1
<b>VI-SPDAT-V2 PRE-SCREEN TOTAL</b>			<b>5</b>

REFER DIRECTLY TO COMMUNITY QUEUE

Category -- All Categories -- Agency -- All Agencies -- Availability -- All -- SEARCH

0 DAYS ACTIVE PROGRAM

Program Type: Individual

Program Start Date: 09/16/2020

Assigned Staff: Trainer Deleon

Head of Household: Ash Ketchum

**Program Group Members**

No active members

**Status Assessments** +

No statuses

Assessment due every year  
 Notification: ON

Waiting for sandiego-train.clarityhs.com...

1

### Your Service Provider Workflow

All clients that are entered into Coordinated Entry should already be enrolled in a program in HMIS.

2

### Enrollment into Coordinated Entry program

3.10 Project Start Date should be the date that you started working with the client towards attaining housing.

3

### Complete a Current Living Situation Assessment

4.12 Current Living Situation is required to be collected anytime any of the following occurs ...

4

### Complete a CES Triage Tool

This 4.19 Coordinated Entry Assessment informs prioritization from the Community Queue.

5

### Referral to the Community Queue and Check In

This 4.20 Coordinated Entry Event will result in a client being visible on the Community Queue.

6

### Tracking CE Events through a program service

Some 4.20 Coordinated Entry Events will need to be recorded through a program service.

7

### Exit from Coordinated Entry program

The 3.11 Project Exit Date should be the date that ...

## Referral to the Community Queue and Check In

This 4.20 Coordinated Entry Event will result in a client being visible on the Community Queue.

The CES Triage Tool is a housing assessment used to refer a client to the community Queue. This 4.19 Coordinated Entry Assessment is needed in order for a client to be referred to the Community Queue.

The screenshot displays the CES Triage Tool interface for a referral. The header shows the client's name, 'Ash Ketchum', and navigation tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, CONTACT, LOCATION, ASSESSMENTS, NOTES, FILES, and REFERRALS. The user is identified as 'Trainer Deleon, San Diego Coordinated Entry System'. A green notification bar at the top states 'Changes successfully saved.' The main form is titled 'REFERRAL: ASSIGN' and contains the following fields:

Client	Ash Ketchum
Referred to	Community Queue
Referring Agency	San Diego Coordinated Entry System
Referred Date	09/16/2020 11:20 AM
Days Pending	0 day(s)
Qualified	Yes
VI-SPDAT-V2 score	5
Last Activity	09/16/2020 <span>CHECK-IN</span>
Referred by Staff	Trainer Deleon ⓘ
Private	<input type="checkbox"/>

At the bottom of the form are buttons for 'SAVE CHANGES' and 'CANCEL'. The right sidebar contains sections for 'Household Members' (No active members), 'Active Programs' (TRTA - Outreach - SD Street Outreach, CES - CE - San Diego), and 'Assigned Staff' (2), with profile icons for CD and TD.

## Referral to the Community Queue and Check In

This 4.20 Coordinated Entry Event will result in a client being visible on the Community Queue.

You will need to continue Checking the client in so that they remain on the Community Queue.

The screenshot shows a web application interface for managing a client's referral to the Community Queue. The header displays the client's name, "Ash Ketchum", and the user's name, "Trainer Deleon, San Diego Coordinated Entry System". The navigation menu includes "PROFILE", "HISTORY", "SERVICES", "PROGRAMS", "CONTACT", "LOCATION", "ASSESSMENTS", "NOTES", "FILES", and "REFERRALS". The "REFERRALS" tab is active.

The main content area is titled "REMOVE FROM QUEUE". It contains a form with two fields:

- Reason for Removal:** A dropdown menu with the text "-- Select Reason --".
- Queue Removal Date:** A date field showing "09/16/2020" with a calendar icon.

Below the form are two buttons: "SAVE CHANGES" and "CANCEL".

The "NOTES" section is currently empty, displaying "No records to display...". It includes a rich text editor with buttons for bold (B), italic (I), link, and list. A "SEND NOTE" button is located at the bottom right of the notes area.

1

### Your Service Provider Workflow

All clients that are entered into Coordinated Entry should already be enrolled in a program in HMIS.

2

### Enrollment into Coordinated Entry program

3.10 Project Start Date should be the date that you started working with the client towards attaining housing.

3

### Complete a Current Living Situation Assessment

4.12 Current Living Situation is required to be collected anytime any of the following occurs ...

4

### Complete a CES Triage Tool

This 4.19 Coordinated Entry Assessment informs prioritization from the Community Queue.

5

### Referral to the Community Queue and Check In

This 4.20 Coordinated Entry Event will result in a client being visible on the Community Queue.

6

### Tracking CE Events through a program service

Some 4.20 Coordinated Entry Events will need to be recorded through a program service.

7

### Exit from Coordinated Entry program

The 3.11 Project Exit Date should be the date that ...



## Tracking CE Events through a program service

Some 4.20 Coordinated Entry Events will need to be recorded through a program service.

You will need to record specific 4.20 Coordinated Entry Events using services within the CE program.

**Ash Ketchum** Trainer Deleon, San Diego Coordinated Entry System TD

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

### CLIENT PROFILE

Social Security Number	XXX - XX - XXXX
Quality of SSN	Client doesn't know
Last Name	Ketchum
First Name	Ash
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	05/22/1987
Adult. Age:	33
Middle Name	None
Gender	Male
Race	Asian
	Hispanic/Non-Latino

**Household Members** Manage

No active members

**Active Programs**

TRTA - Outreach - SD Street Outreach

CES - CE - San Diego

**Assigned Staff** 2

**CD TD**

UNIQUE IDENTIFIER  
**54F0B8869**

COMMUNITY QUEUE

Client has an active entry on the Community Queue: Default

**No Contact Information Add**

<https://sandiego-train.clarityhs.com/clienta/71396/programs>

1

2

3

4

5

6

7

### Your Service Provider Workflow

### Enrollment into Coordinated Entry program

### Complete a Current Living Situation Assessment

### Complete a CES Triage Tool

### Referral to the Community Queue and Check In

### Tracking CE Events through a program service

### Exit from Coordinated Entry program

All clients that are entered into Coordinated Entry should already be enrolled in a program in HMIS.

3.10 Project Start Date should be the date that you started working with the client towards attaining housing.

4.12 Current Living Situation is required to be collected anytime any of the following occurs ...

This 4.19 Coordinated Entry Assessment informs prioritization from the Community Queue.

This 4.20 Coordinated Entry Event will result in a client being visible on the Community Queue.

Some 4.20 Coordinated Entry Events will need to be recorded through a program service.

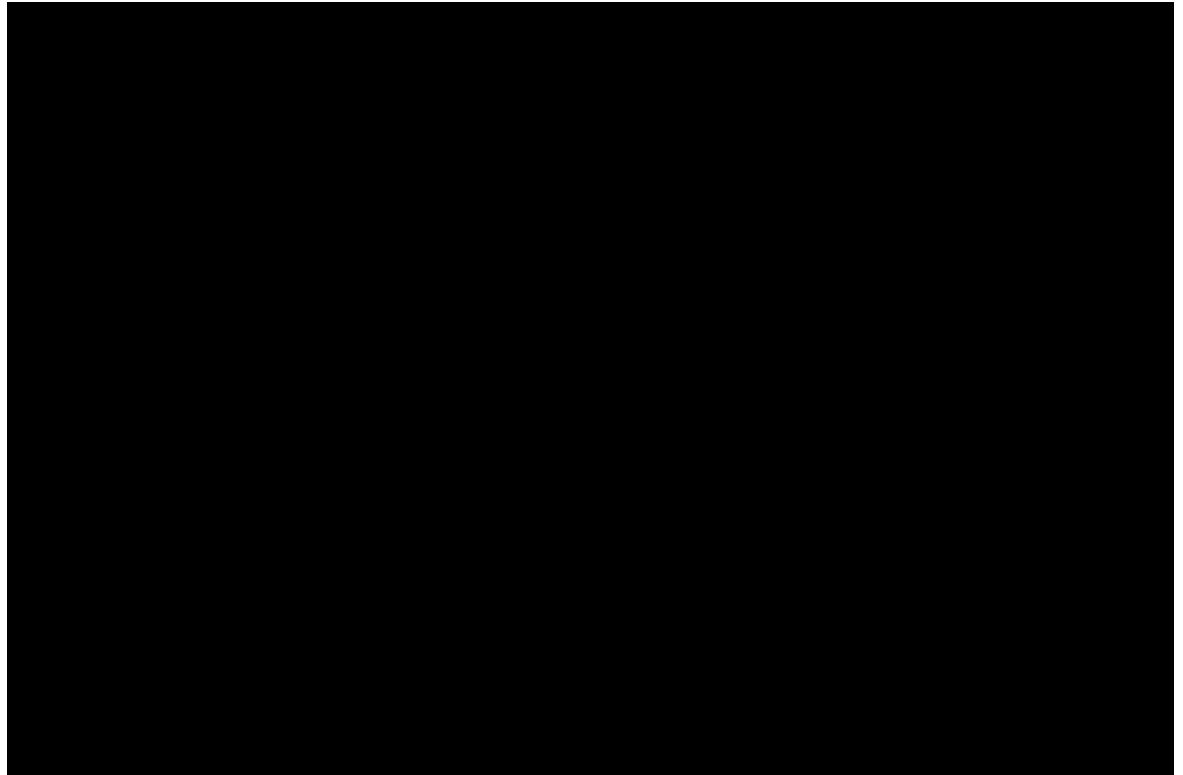
The 3.11 Project Exit Date should be the date that ...

## Exit from Coordinated Entry program

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:

- A. The client has entered a permanent residential project type (e.g., PSH) or is otherwise known to have found permanent housing;
- B. The client is known to have left the CoC to pursue other assistance or resources;
- C. The client is deceased;
- D. 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.

You will need to exit the client from the Coordinated Entry program when the client is no longer receiving services in our region (i.e. CoC CA – 601).



1

2

3

4

5

6

7

**Your Service Provider Workflow**

**Enrollment into Coordinated Entry program**

**Complete a Current Living Situation Assessment**

**Complete a CES Triage Tool**

**Referral to the Community Queue and Check In**

**Tracking CE Events through a program service**

**Exit from Coordinated Entry program**

All clients that are entered into Coordinated Entry should already be enrolled in a program in HMIS.

3.10 Project Start Date should be the date that you started working with the client towards attaining housing.

4.12 Current Living Situation is required to be collected anytime any of the following occurs ...

This 4.19 Coordinated Entry Assessment informs prioritization from the Community Queue.

This 4.20 Coordinated Entry Event will result in a client being visible on the Community Queue.

Some 4.20 Coordinated Entry Events will need to be recorded through a program service.

The 3.11 Project Exit Date should be the date that ...

## Next Steps

- Please make sure to take and pass the HMIS-CE Data Standards Quiz with a score of 90% or higher.
- Please make sure you start enrolling your clients into the CE program once you are given access to the San Diego Coordinated Entry System agency in Clarity.
- Please contact [support@rtfhsd.org](mailto:support@rtfhsd.org) if you have any questions or concerns.