San Diego CES: Office Hours Webinar #2

- CES Workflow Overview: Enrollments, CQ, Assessments
- CES and RTFH's Role
- Referrals – Accepting, Denying, Next Steps

CES Workflow Overview

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CES Enrollments – When should they occur?

Is enrollment into CES mandatory?

What Role does the Client Play?

CE Enrollments key concepts

CE enrollments should only occur when housing is identified as a need and all other diversion options have been discussed

Enrollment into CES is NOT a precursory step to the CE workflow it should only occur AFTER diversion conversations have been exhausted and housing placement is determined to be a need.

Clients should be active participants in the decision to enroll in CES.

Community Queue Referrals

When do I check in my clients referral to the Community Queue? Why?

When should I stop checking in my clients CQ referral?

Can my clients CQ referral expire? Should I let it?

Community Queue Referrals

If you are actively engaging with your client and housing is still a need, you should be checking in your clients CQ referral at least every 90 days.

If you are no longer engaging with your client, cannot locate them, they've left the area, or self resolved, you do not need to check in their CQ referral

If you are no longer engaging with your client for any of the reasons above, you can exit them from CE and their CQ referral will expire after 90 days

Updating Assessments

When should I be updating client assessments?

What could serve as a trigger for updating?

Why is it important?

Updating Triage Tools: When and why?

- Triage Tools are a snapshot into the client experience
- Up to date information is key to determining accurate eligibility components which can impact referral viability
- Can capture events that increase vulnerability these can include but are not limited to: changes disability status, income, household composition, etc.
- Should be updated when changes are known to have occurred
- Should be updated at least annually at minimum.

CE workflow Best Practices

- Enrollment in CES after diversion conversations have been exhausted
- Engaging with your client and checking the CQ referral in every 90 days
- Keeping Triage tools updated when changes occur

- Enrollment in CE at first engagement
- Checking CQ referrals in without engagement
- Waiting over a year to update triage tool information

CES and RTFH’s Role

What you can expect VS managing expectations

- Is there such a thing as a “bad match”?
- What role does eligibility and data collection play?
- Understanding a waitlist VS a prioritized community queue
- Misconceptions about timelines: what RTFH does VS what it does not
- What can be expected of CES/RTFH?

What you can expect VS managing expectations

- A "bad match" can almost exclusively be linked to inaccurate or outdated information, our goal is to support accurate data.
- CES matches to program eligibility FIRST regardless of vulnerability. It is important to keep triage information up to date.
- CES is not a waitlist. Our list is dynamic and changes every day this makes associating timelines with referral matches impossible. Our goal is to ensure that your client has the most accurate data and best chance to be matched through workflow mastery
- What can be expected of CES/RTFH? – Next slide

CES: What you can expect

- Acknowledgement of referral requests within 3 business days
- A match email that contains all points of contact, contact information, and next steps to ensure the referral is a success
- Assistance with communication, CES workflow, HMIS related CE questions, etc.

Hello everyone,

This is a notice that the following clients have been referred to the following programs through Coordinated Entry System (CES). This is not a guarantee for housing or an entry into a program. In this document are the parties involved with this referral. You are being included on this notice because you are either the Housing Provider or Homeless Service Provider who engaged the client. Please note that CES is designed to prioritize the community's most vulnerable households and refer them to available resources. Any additional program eligibility or requirements must be addressed during initial project intake.

Next Steps for Housing Provider and Homeless Service Provider:

1. Work together to contact the client and communicate the details of this potential housing opportunity, eligibility of program, and application process.
    a. Highlighted boxes mean there is no Contact Information in the "Contact" Tab in Clarity. If you are the Homeless Service Provider listed for a client please update clients contact information in Clarity and communicate this to the Housing Provider listed.
2. If the client is interested in moving forward with this housing program, work together to assist the client in submitting documents and completing the application.
3. Please maintain contact with each other and the client to facilitate a successful completion of the referral process.
4. If you're a Housing Provider requesting more matches for your program please email **support@rtfhsd.org**

IMPORTANT: **Please ensure all your clients are referred directly to the Community Queue. Please refer to the updated (April, 2021) CES workflow guide to aid you in completing these steps.**
https://www.rtfhsd.org/wp-content/uploads/2020CESWorkflowGuide_04_2021_final.pdf

Housing Provider	Client ID	Homeless Service Provider

RTFH is not the Housing Provider. We do not operate or manage Housing Programs. Please connect with the points of contact listed in the Housing Provider column to discuss the details of the program and your client.

Thank you,

Coordinated Entry System Specialist

Accepting Referrals

- Programs must use a housing first orientation – minimal barriers to housing
- Accept referrals regardless of challenges
- Make the minimum amount of attempts to engage with the referred client (5 unique attempts within 5 business days)
- Utilize information provided in the match email to collaborate with care team members, housing providers, outreach workers, etc.

Denying Referrals

- Programs may deny a household referred by CES if they are ineligible to participate in the program or pose a safety concern
- Denials must be communicated verbally and in writing with the client and abide by your agency's appeal policy. Clients have the right to challenge a denied referral.
- Households always have the option to decline the housing resource they've been matched to.
- Denial reasons are incredibly important for future resource connection, please be as detailed as possible.

Denying Referrals: Important notes

- If there is a denial due to ineligibility i.e. disabling condition was not updated, providers are required to update that disabling condition in HMIS. This can be updated in the CES enrollment.
- If information causes a client be ineligible for a resource such as household composition, disabling condition, discharge status, income, etc. Those elements must be updated in the system.
- It goes back to good data in/good data out. If the above information is not updated, there are no "guard rails" to prevent that client from continuing to be denied in the future due to inaccurate data.

Important Links

Help Desk: support@rtfhsd.org

CES P&P Doc: https://www.rtfhsd.org/wp-content/uploads/2025/03/RTFH-2023-Revised-CES-Policies-and-Procedures-final.pdf

CES Workflow CES Enrollment and CLS:
https://www.youtube.com/watch?v=fBZNdfPehfQ&list=PL5mWCtDUvVqYW0x53xHMlVt_LZ9MQYVNt&index=7&t=33s

CES Workflow Triage Tools & Community Queue:
https://www.youtube.com/watch?v=IUFeoiiYqbQ&list=PL5mWCtDUvVqYW0x53xHMlVt_LZ9MQYVNt&index=8

CES Workflow Community Queue Check ins, CE events, Exits:
https://www.youtube.com/watch?v=dspaF3s1Y4Y&list=PL5mWCtDUvVqYW0x53xHMlVt_LZ9MQYVNt&index=9

RTFH

Questions?

support@rtfhsd.org

www.rtfhsd.org