CES User Guide in Clarity:

Triage Tool

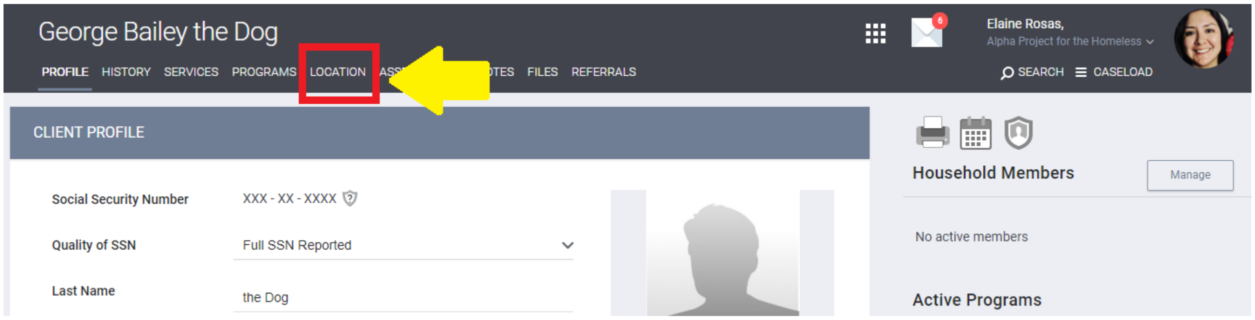
SAN DIEGO

Regional Task Force

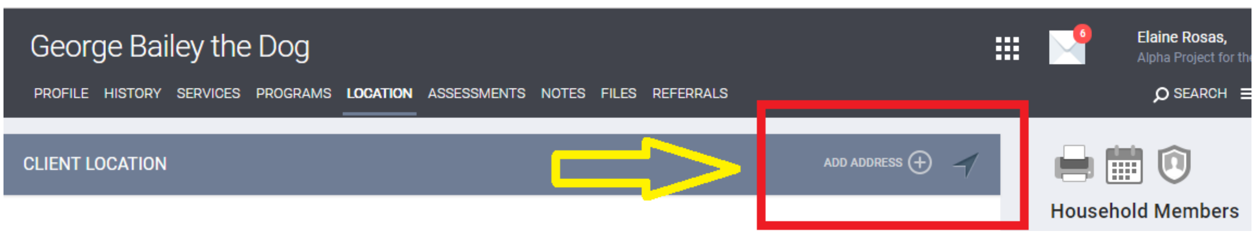
On the Homeless

Step 1: Location Tab: Record Contact Information

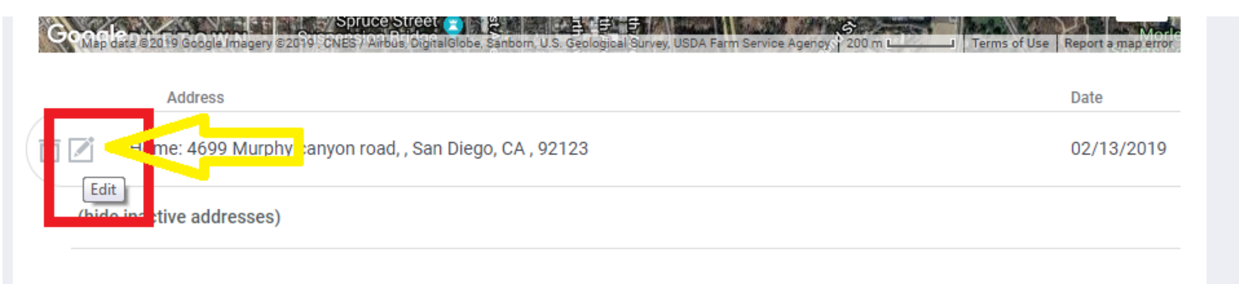
1. From the client profile, click on “Locations” tab



2. Click on the “Add Address”



3. Fill out “Client Location” tab.
   a. For the “Name” section you can either put the client’s name or the shelter or location where the client is staying
   b. For the address section, if there is no address just put N/A or 00000 for the zip code line.
4. Click Save at the bottom of the page
5. Once the information is captured, keep in mind, that you will need to click into the “address edit” icon to see the phone number:

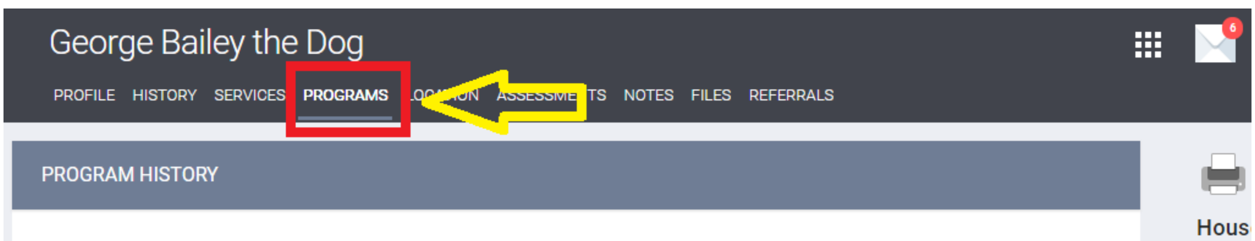


Step 2: Programs Tab: Record Client's HUD UDEs in your project

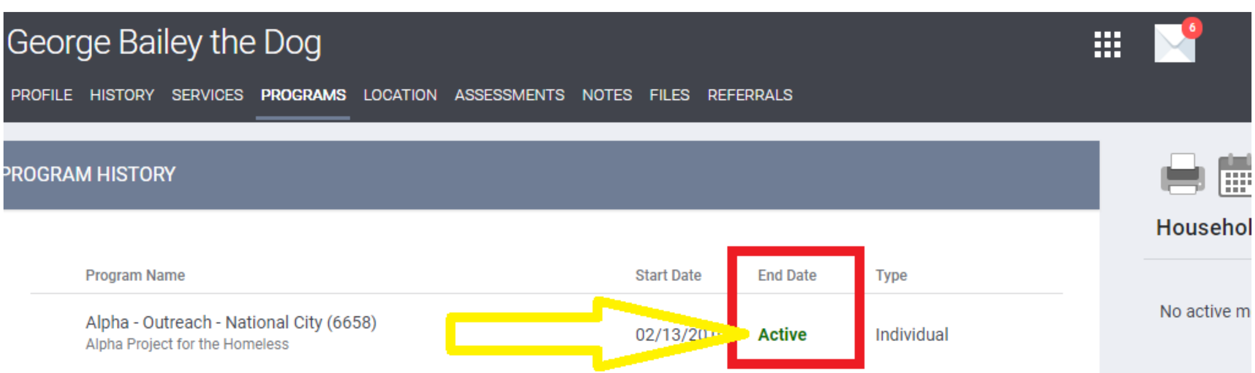
For clients to make it onto the By-Name-List (BNL) for matching and referrals to housing resources, clients must have an "Active" enrollment into a program.

Make sure you are switched into your Agency. In this example I am switched into Alpha Project

1. Enroll client into your project on the Programs tab, examples: Emergency Shelter, Outreach, Day Center, Supportive Services Only (SSO) etc.



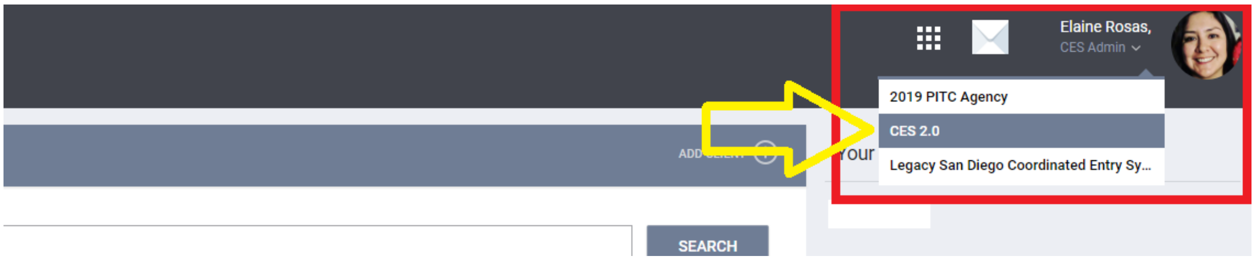
2. Always make sure the client has an ACTIVE enrollment into a homeless dedicated program before administering the Triage Tool



Keep in mind: Clients that don't have an enrollment into a project will NEVER populate onto the BNL which is used for matching and case-conferencing.

Step 3: Switch From Your Agency to "CES 2.0"

In order to administer the sub-population Triage Tool, you must switch from your agency to the "CES 2.0" switch.

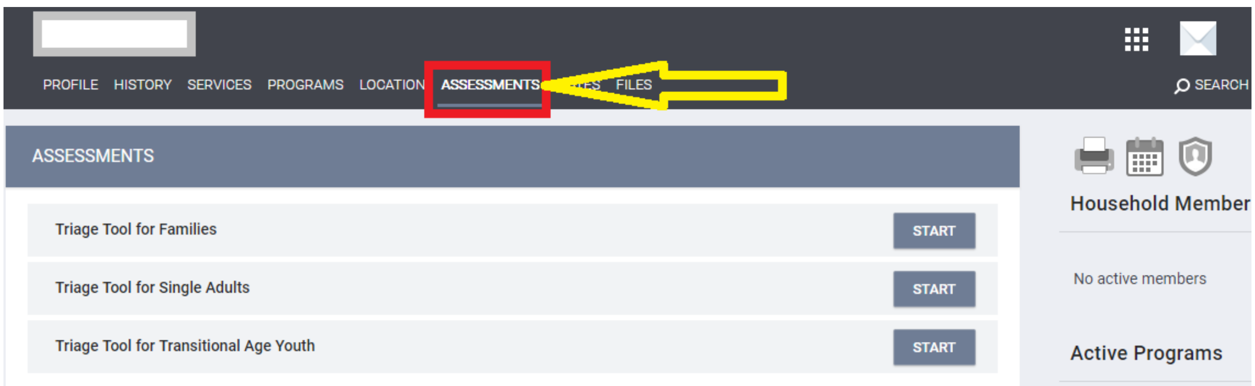


After switching from your agency to CES 2.0 you will be taken back to the "search" screen. You will have to pull your client back up by clicking on your clients name on the right side of the screen under the "Your recent client searches accessed:" section.

Step 4: Assessment Tab: Begin the Assessment

It is strongly recommended to not administer assessment in one sitting. The assessment has built in diversion pause points because the assessment is designed to be administered over time. Completing this section in one sittings sends the message that clients are filling out an application for housing and that is not the purpose of the assessment.

1. Click on the "Assessments tab" to view the 3 sub-population Triage Tools: Singles, Families, and Transitional Aged Youth (TAY).



2. Choose the most appropriate Triage Tool for your client and click Start.
3. Once you have completed the assessment: DO NOT GIVE THE CLIENT THEIR SCORE OR HOUSING INTERVENTION.
4. Encourage the client to stay connected to you and other service providers who will be ensuring the client has Active HUD UDEs.
5. Once you have completed the Triage Tool the RTFH will notify you if your client is next on the BNL.

Please contact support@rtfhsd.org if you have any additional questions.