Coordinated Entry Workflow

Search for Household

- Select **All Doors Lead Home Coordinated Entry** as the Agency.
- Search for client using Clarity ID; first three letters of first and last name; or full name.
- NOTE: Please refer to training materials from System Administrator if you have questions on how to search or build households.

Complete ADLH ROI

- Go to Files tab on client profile and Select "Add Form".
- Upload a paper copy of the ADLH ROI. If verbal consent, select ADLH Homeless CE ROI and click Add.
- Review ROI with client, toggle over appropriate of 2 options, and sign. **Will need at least a dot if getting verbal consent on signature lines**

Enroll

- Select Program Tab.
- Select the Program for location assessment is completed: CSMIS ADLH CE for Lincoln; BOS ADLH CE for Balance of State.
- Select ENROLL, complete enrollment page entirely and accurately.

Assess

- Select the assessment tab from the CSMIS or BOS ADLH CE enrollment. ***DO NOT SELECT ASSESSMENT ON THE TOP BAR!***
- Complete the Current Living Situation **NOTE: This is our HUD-required homeless verification for Coordinated Entry and must be completed at enrollment and whenever the CLS changes. Needs to be updated every 90 days.
- After Current Living is completed, select Assessments from program enrollment. Complete the most appropriate ADLH CE assessment.
  - Families: More than one person in the household, including youth-led households;
  - Singles: Anyone 25 years of age or older;
  - Transition Age Youth: Anyone 24 and younger; if a youth is under age 18, we must get a parent/guardian approval on ROIs.

Additional priority factors

- Additional Points for: Youth, Veteran, Actively Fleeing, and Disabling Condition.
- Length of time homeless (LOT) titrates up the longer homelessness is experienced. Make sure to fill all fields related to length of time.
- DO NOT COMPLETE: CE MANAGER ONLY: Chronic "Documented Up" question. Homeless Documentation must be uploaded to client files before this can be confirmed.

Refer to Queue

- Toggle on the most appropriate Community Queue. Can refer to Lincoln and Balance of State, but limit it to one BOS queue.
- BOS General queue is for those who are open to relocating and may have more than one option.
- VERY important to narrow down location if referring to BOS Queue. There are too many miles across the state to pick for someone.
- Make notes of importance for housing location/problem solving.

Community Queue & check ins

- Hit search, the Referrals tab will show up under your username.
- Select the Queue. Go to the client, and click the pencil by the name.
- Hit check in. Notes can be added by scrolling down and typing in updates relating to housing.

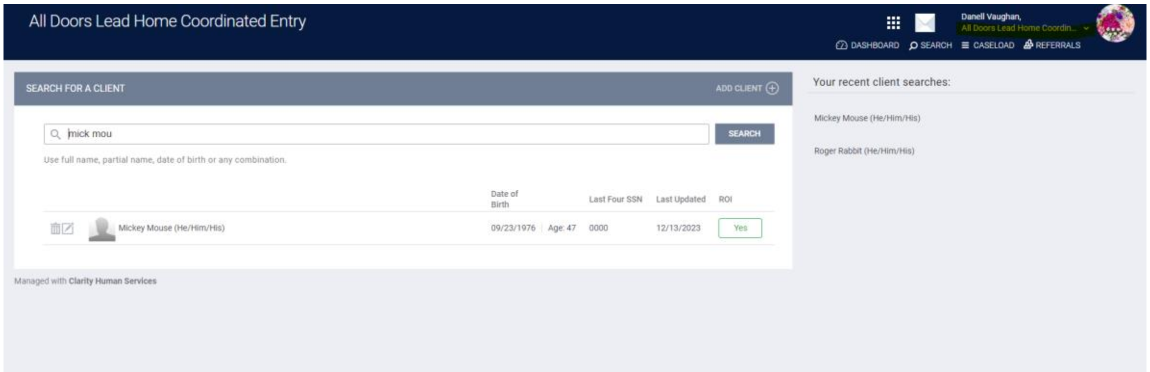
Remove from Snoozed

- Go to the Community Queue. Select Snoozed tab.
- Select Region Queue. Search for client name. Hit Unsnooze button on far right corner.

Update after snooze

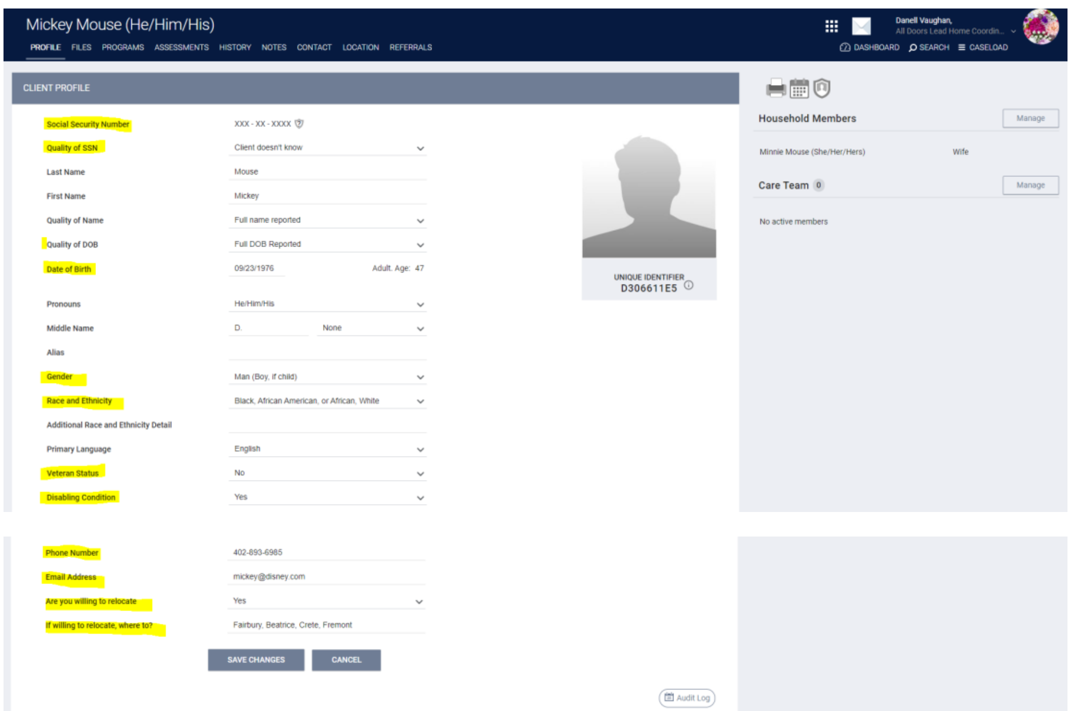
- Go to Community Queue tab. Select the person, and check in or add note. Should also update Current Living Situation.

Search for Household & Client Profiles



**Before completing any enrollments or assessments, please make sure the NMIS ROI is up to date on the client profile.

Profile Page:



The Profile Page includes our HUD-required data elements (highlighted). None of these data elements should be answered with Data Not Collected; efforts should be made to get as much information as possible. If a client is not able to answer the questions, mark the data element Client Does Not Know or Client Refused.

For Social Security Numbers: This data element can be a partial number (ex: last 4 digits). If a client does not know their SSN or that of a household member, please enter all zeros (000-00-0000). DO NOT enter any other numbers. The system recognizes the zeros as Client Doesn't Know.

For Veteran Status & Disabling Condition: These data elements cascade over to the assessment. If you do not complete these data elements on the Profile Page prior to doing the assessment, please make sure to update them once the assessment is completed to ensure they match.

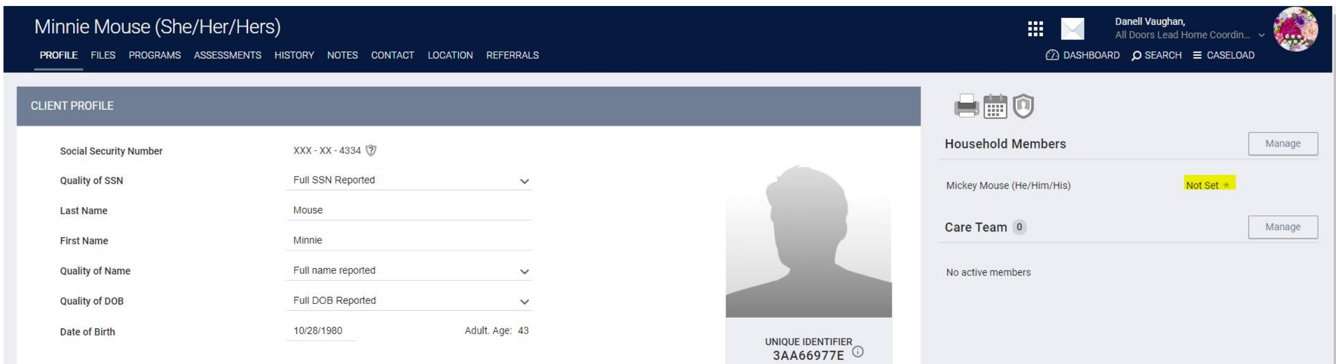
Coordinated Entry Workflow

Unique Identifier: Please use this ID whenever communicating through email or messaging with other agencies per our Privacy and Security practices. If you are communicating with an agency that does not have access to Clarity, please make sure any written communication is encrypted.

Phone Number, Email Address: These data elements only appear when under the All Doors Lead Home Agency. Adding phone and email contact here ensures that agencies can quickly find a client's contact information to get in touch with them.

Are you willing to relocate: If a client answers yes, it is important to narrow down the location for the BOS. Take into consideration: Does the client have transportation? Does the client have any community connections in that area? Is the client able to access needed services in that area? NOTE: If a client expresses interest in Omaha, they will need to connect with MAACH, Omaha's Coordinated Entry System.

For Households: The Head of Household will have a star appear next to their name. All assessments and referrals should be done under the Head of Household.

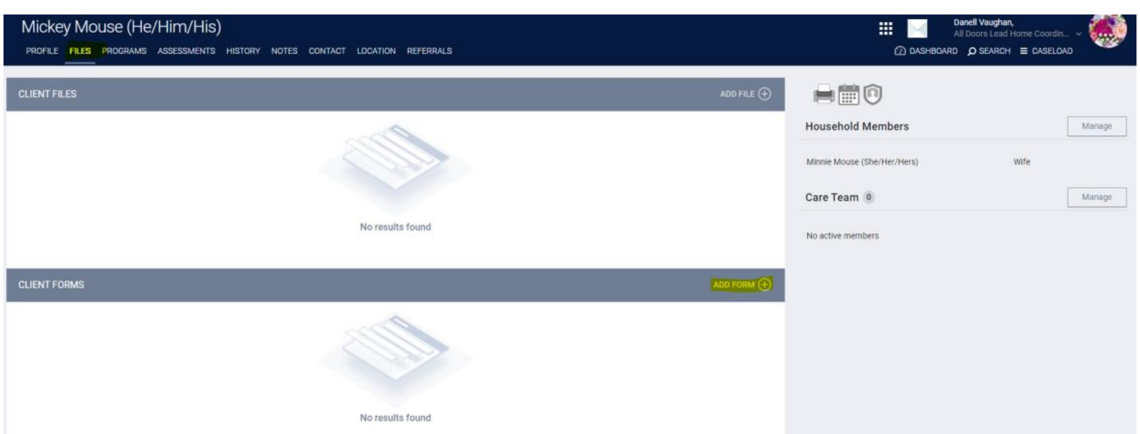


Complete ADLH ROI

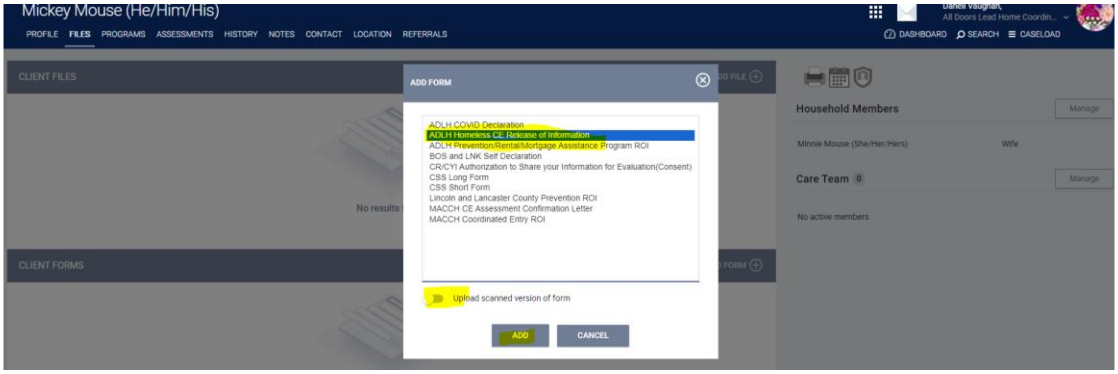
Note on Releases: A parent can sign the ROI for any children in the household for which they are parent or guardian. However, each adult needs to sign or verbally agree to their own ROIs. Youth younger than 18 years old cannot legally sign an ROI for themselves, but can have a parent or legal guardian give permission for them to be assessed and referred to CE.

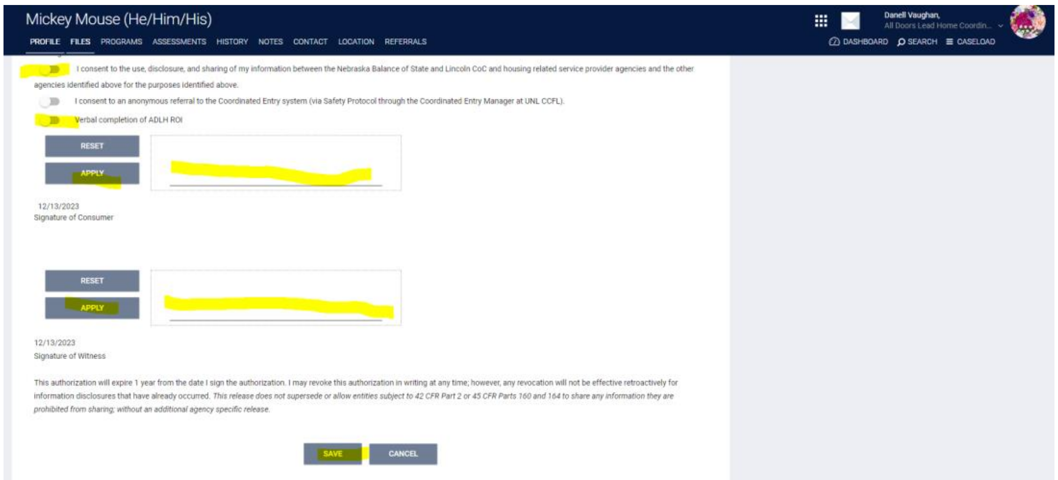
ALDH ROIs can be uploaded signed documents or verbal. For uploaded documents, click the Upload scanned version of form and then select the correct file to upload. For a verbal release, do not click on the toggle, click Save, and then toggle the consent and verbal consent agreements, put a dot or line on the signature, and ten

***ADLH ROIs are good for 1 year. Missing ADLH ROIs can result in clients being snoozed until the release is updated. The CE manager will make a note on the CE referral when an ROI is needed.



Coordinated Entry Workflow

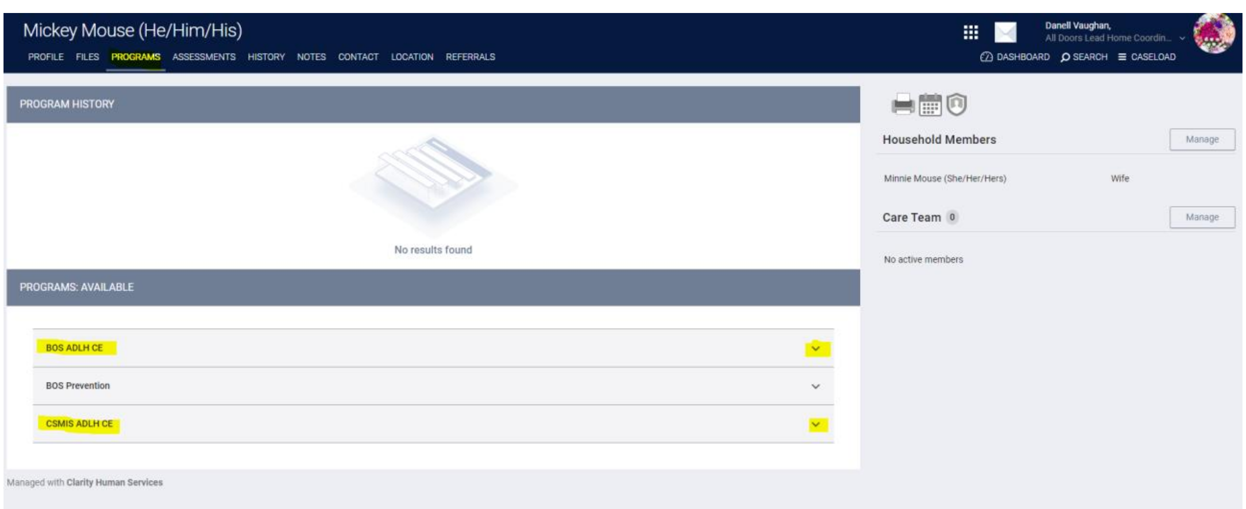




Enroll into Coordinated Entry

IMPORTANT: *Enrollment into BOS or CSMIS ADLH CE should occur before any enrollment into a housing program*. The system time-stamps enrollments and will log any CE enrollment after a housing enrollment as a client that received a program entry as a non-prioritized client for CE.

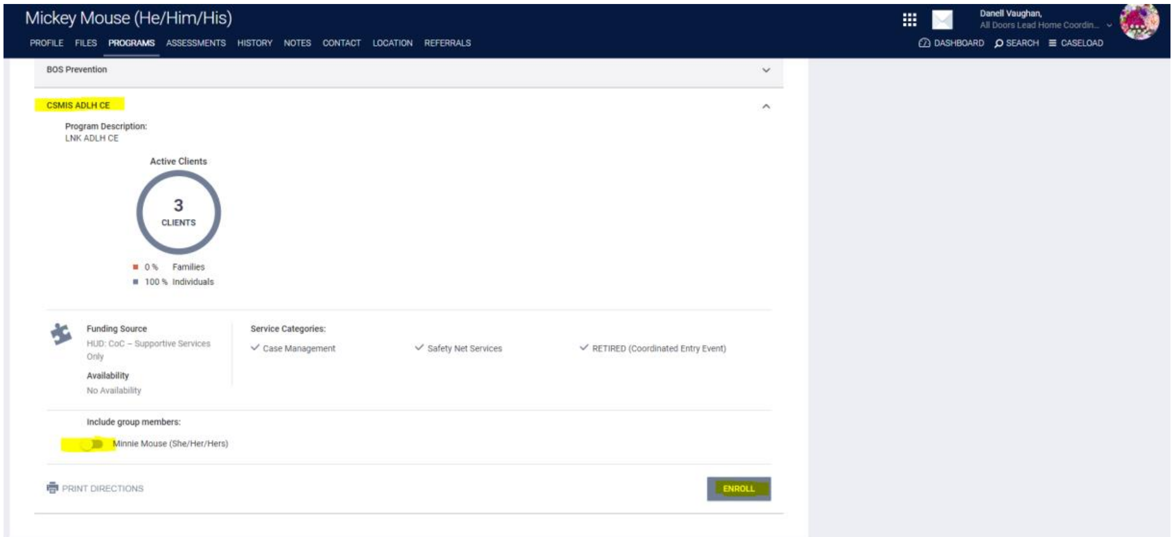
Select the appropriate program: BOS ADLH CE for Balance of State and CSMIS ADLH CE for Lincoln.



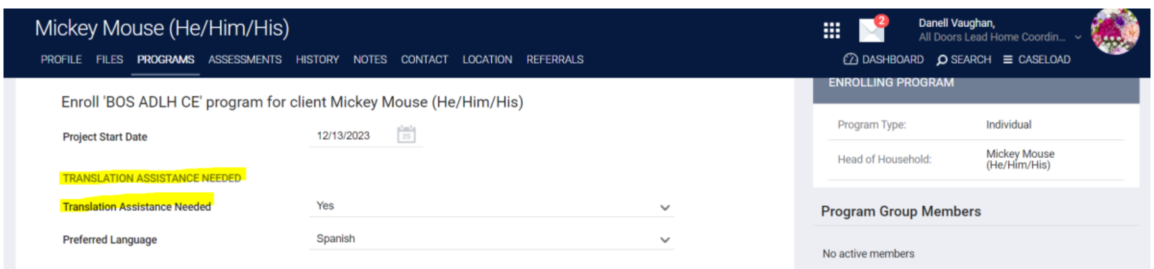
Coordinated Entry Workflow

**Clients only need <u>ONE</u> enrollment into ADLH CE. The enrollment should match where the client is located at the time of enrollment and assessment.

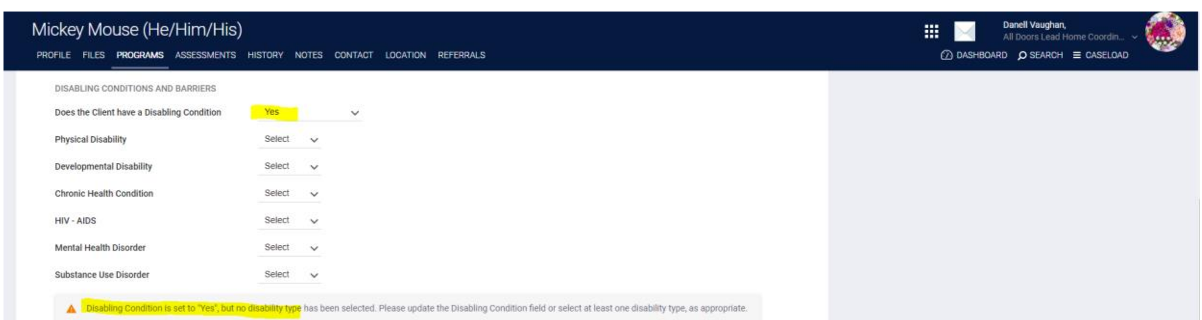
All household members should be enrolled in CE. If there are other household members, click on the toggle next to their name(s) to ensure they are added to the enrollment. Each household member will have enrollment data that will need to be completed.



**Translation Assistance Needed is now a required field on the Enrollment.



If you answer Yes to Disabling Condition, at least one of the conditions also needs to be marked Yes. If you mark No on Disabling Condition, all the disabling condition fields should also be marked No.

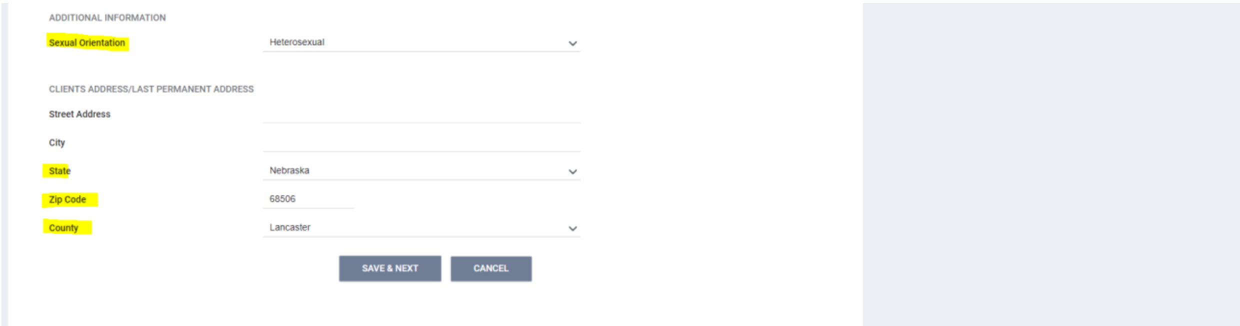


For Income, Non-Cash Benefits, and Health Insurance, if the answer is Yes, one of the fields below must be toggled on; for income, an amount also needs to be recorded.

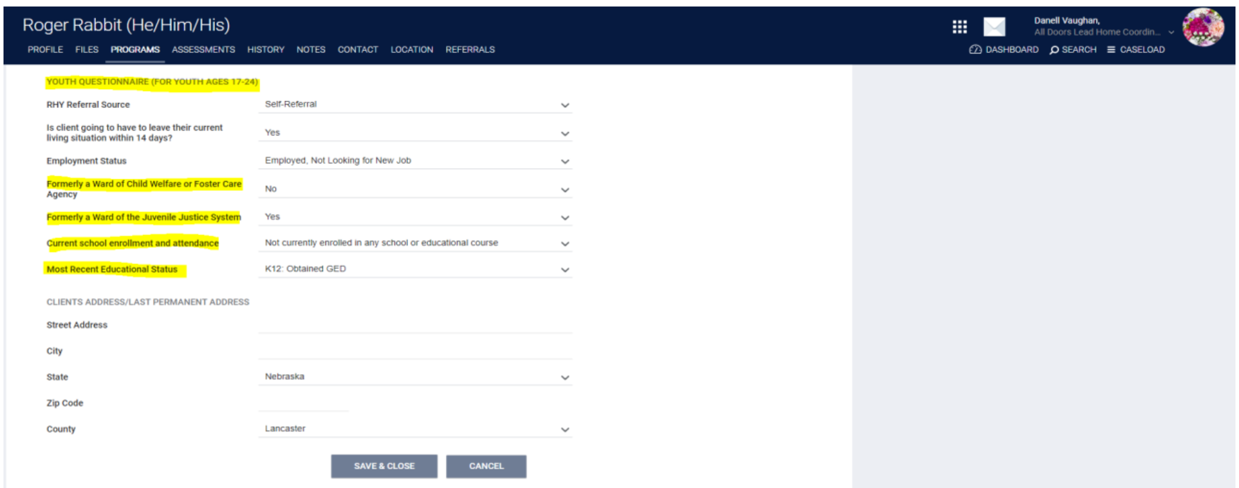
**Sexual Orientation is now a required field on the enrollment.

Please complete the State, Zip Code, and County fields. These fields help us in filtering data for agencies based on location.

Coordinated Entry Workflow

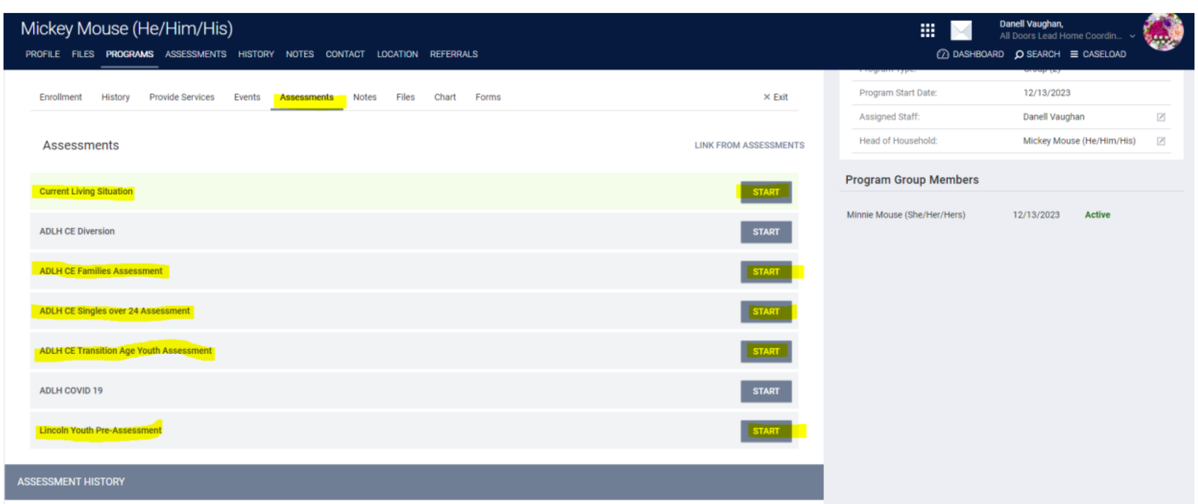


Youth enrolled in ADLH CE will have additional questions populate. HUD has made employment and education a key component of youth engagement and services.



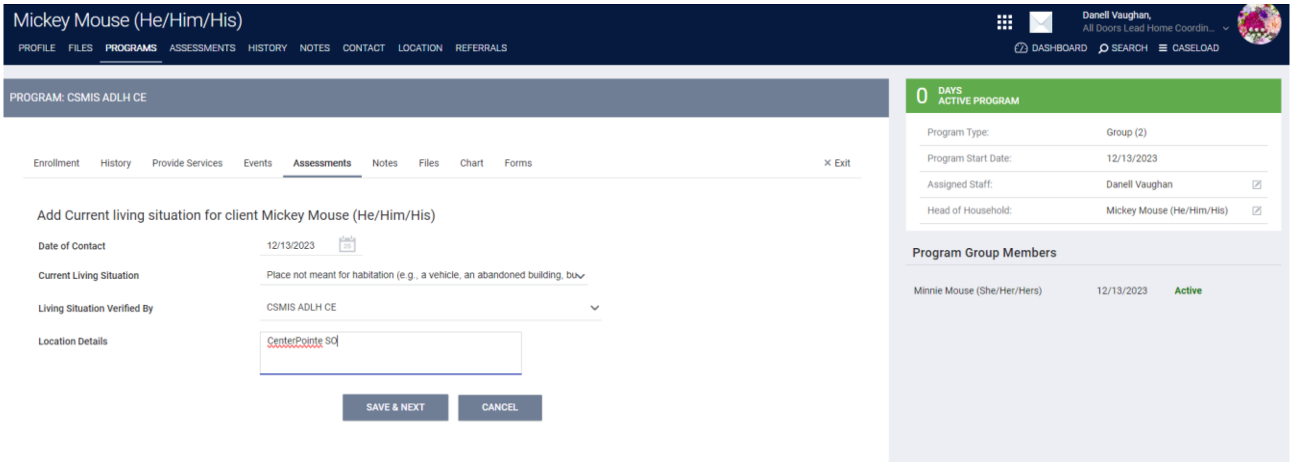
Assess

Assessments should only be accessed under the Assessments Tab in the ADLH CE enrollment.



1. Complete Current Living Situation for ALL household members. The Current Living Situation (CLS) is our HUD-required initial documentation of homelessness for referral to Coordinated Entry. It should be added at enrollment and updated at least quarterly.

Coordinated Entry Workflow

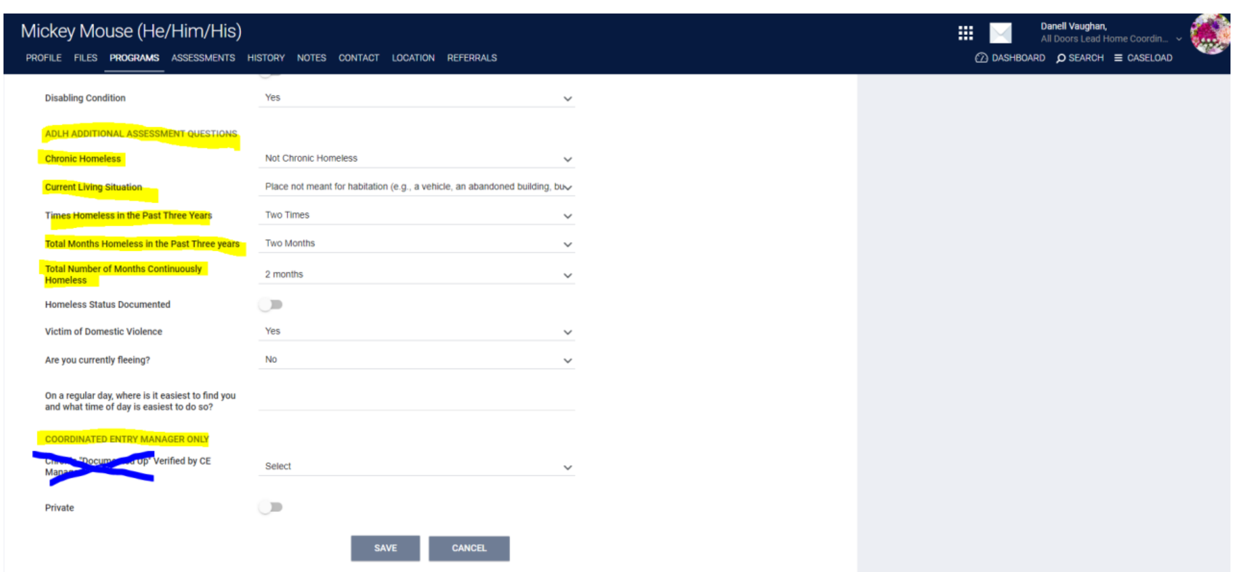


2. **If you are a Lincoln Provider assessing a youth**, complete the Lincoln Youth Pre-Assessment, which helps identify immediate needs as well as the client's interest in our coaching projects through the Youth Homeless Demonstration Project.
3. **For all clients,** complete the appropriate assessment for your client's household. Each assessment has specific questions related to household composition:
    a. ADLH CE Singles Over 24 Assessment: For any individual client ages 25 and older.
    b. ADLH CE Families Assessment: For any household that identifies as a family, including households that don't include children and youth-led households with or without children. If the household does not have children, questions related to children can be answered Client Prefers Not to Answer.
    c. ADLH CE Transition Age Youth Assessment: For single youth clients ages 24 and younger. If the client is under age 18 or identifies as a ward of the state, parent or guardian permission is needed before completing this assessment.

**For more information or training on the Coordinated Entry Assessments, please reach out to the Coordinated Entry Manager.

Additional Priority Factors

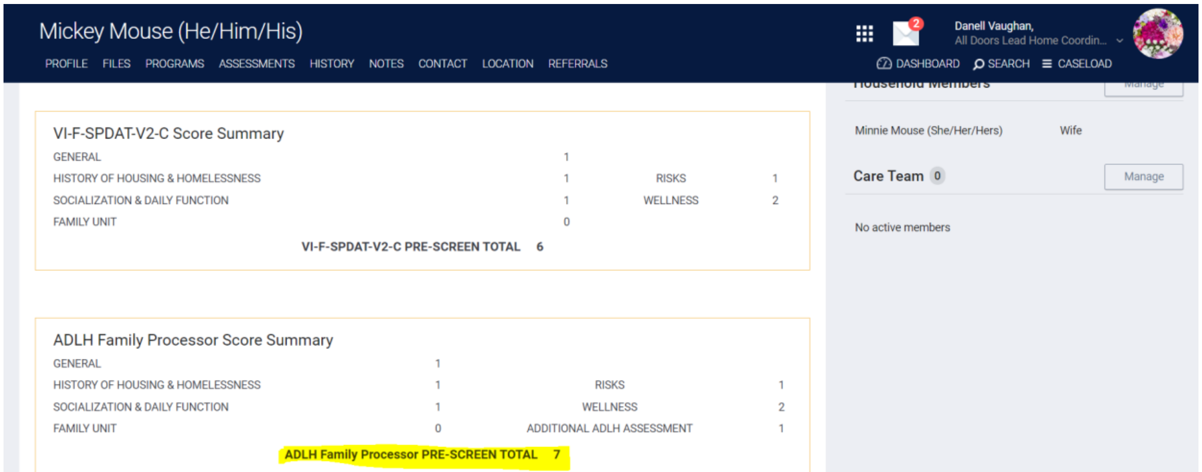
The CE Assessment takes into account a client's LOT, or Length of Time homeless, so it's important to complete the ADLH Additional Assessment Questions. Those questions also help to narrow down who needs to be looked at for "Chronic Documented Up". A client can report their total months in all fields, and when possible, the case managers can verify those months on the client History tab.



Coordinated Entry Workflow

<u>** Chronic "Documented Up" must be verified by the Coordinated Entry Manager ONLY once appropriate documentation has been completed/uploaded</u>. Chronic "Documented Up" means a client has been homeless for 12 months continuous or 4 separate times in 3 years equaling 12 months and reports a disabling condition. Clients can self-verify for up to 3 months of homelessness.

The CE Assessment also provides additional points for clients with the following characteristics: Youth, Veteran, Actively Fleeing, and Disabling Condition.

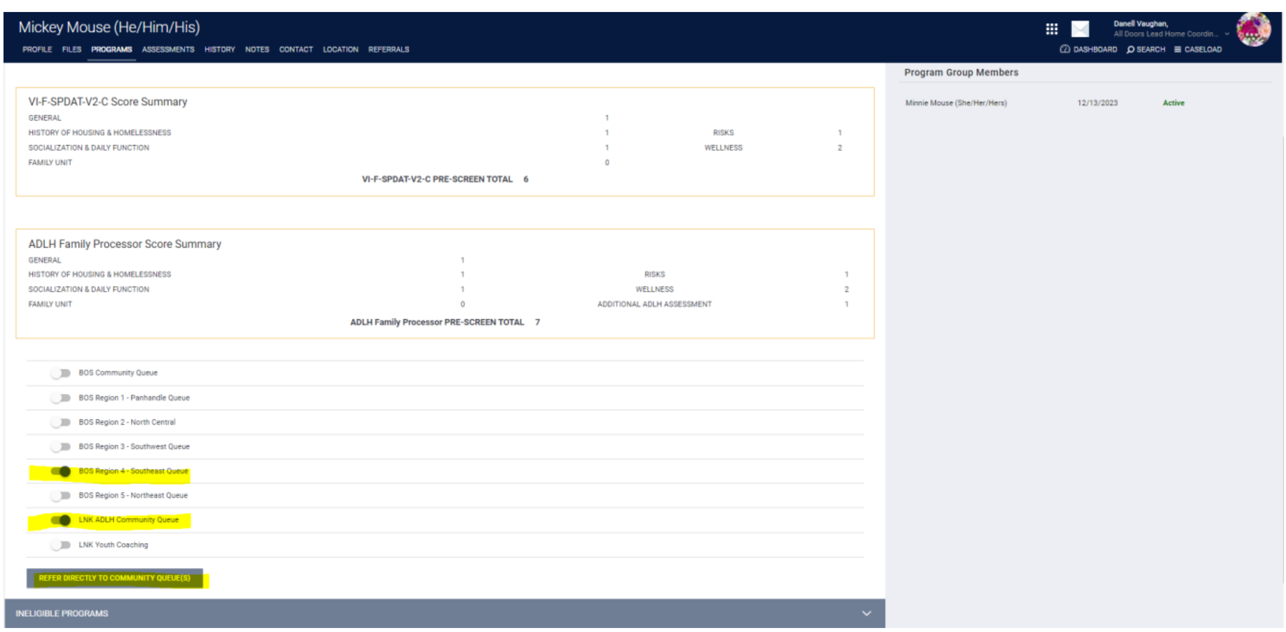


The ADLH Processor total is the weighted score, which will be the prioritized score for the client(s).

Referring to the Community Queues

Once the assessment is completed, you will need to refer the clients to the appropriate Community Queue. Clients can be referred to both Lincoln and the Balance of State Community Queues. However, please only refer to <u>ONE BOS</u> queue as notes do not cascade between the referrals.

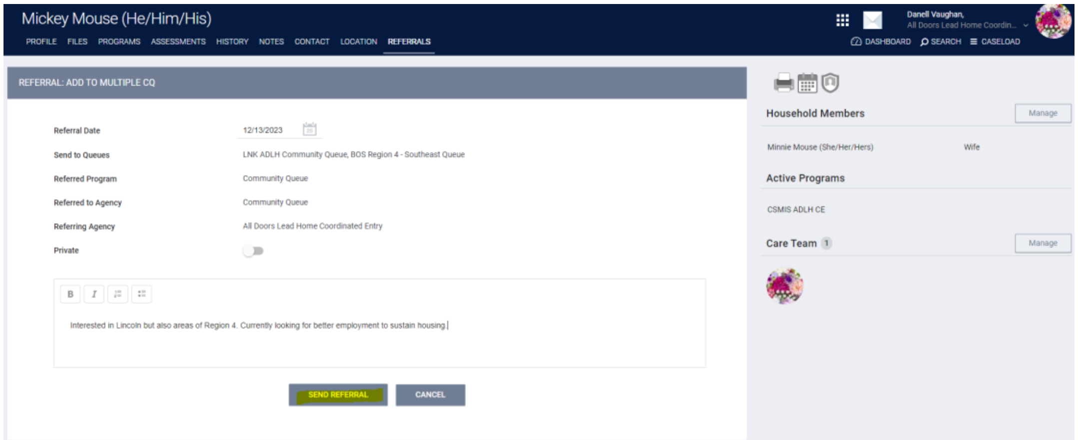
For Lincoln Youth: Youth age 24 and younger interested in coaching can be referred to the LNK Youth Coaching queue at the same time as their referral to the Lincoln queue.



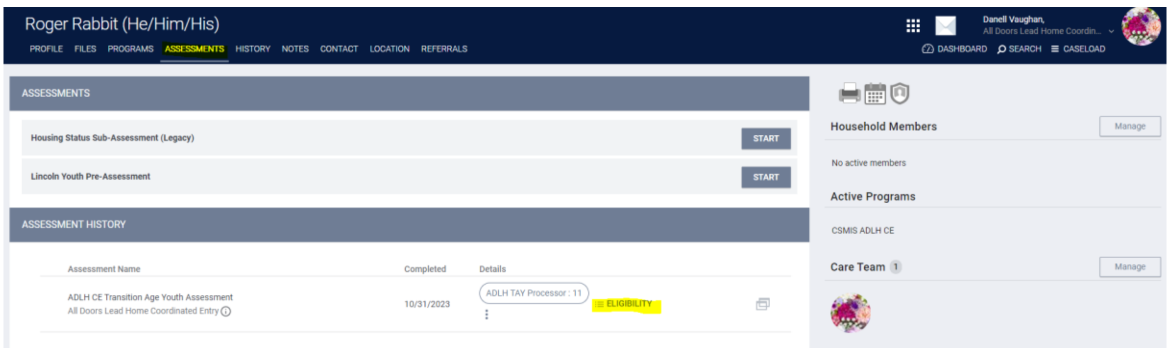
Coordinated Entry Workflow

At the time of referral, you can add notes about the client that might help us in determining their needs.

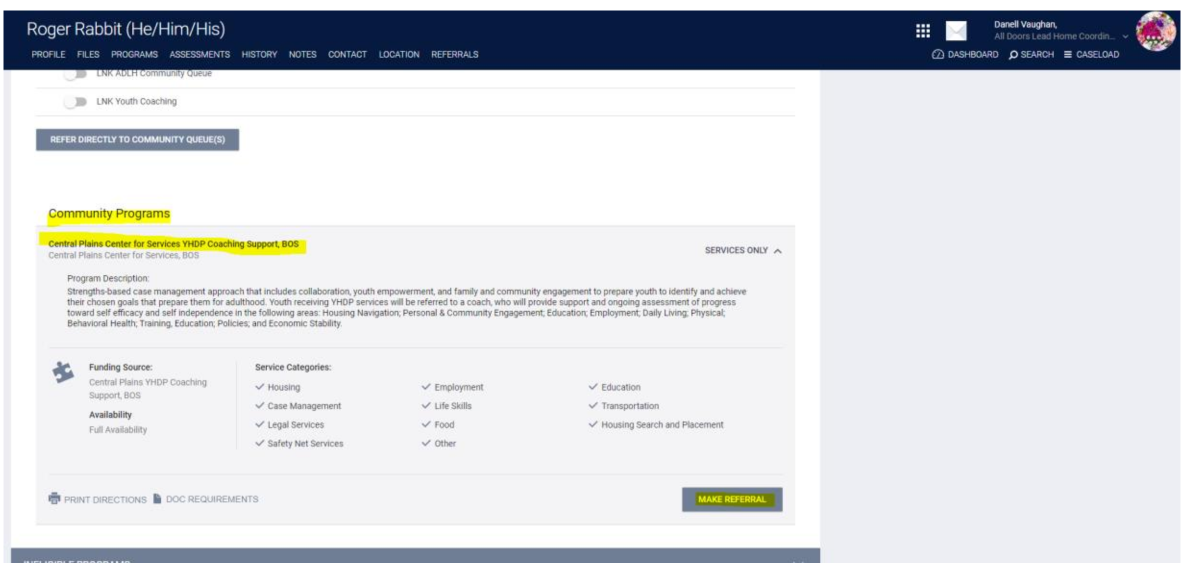
**Remember: These notes will be visible to anyone that has access to ADLH CE so it's best to keep them general.



For youth in the Balance of State: All youth aged 24 and younger receive the option of coaching through Central Plains Center for Services. Coaching referrals should be made at the time of referral to Coordinated Entry. To complete this referral, go back to the client Profile, click on the Assessments tab at the top, then click Eligibility:



The Central Plains coaching project can be found under the referral for the Queues. Click on the program dropdown arrow, and then click Make Referral. It will allow you to add notes. It is helpful to add where the client is located so they can ensure they assign a coach located in the appropriate service area.

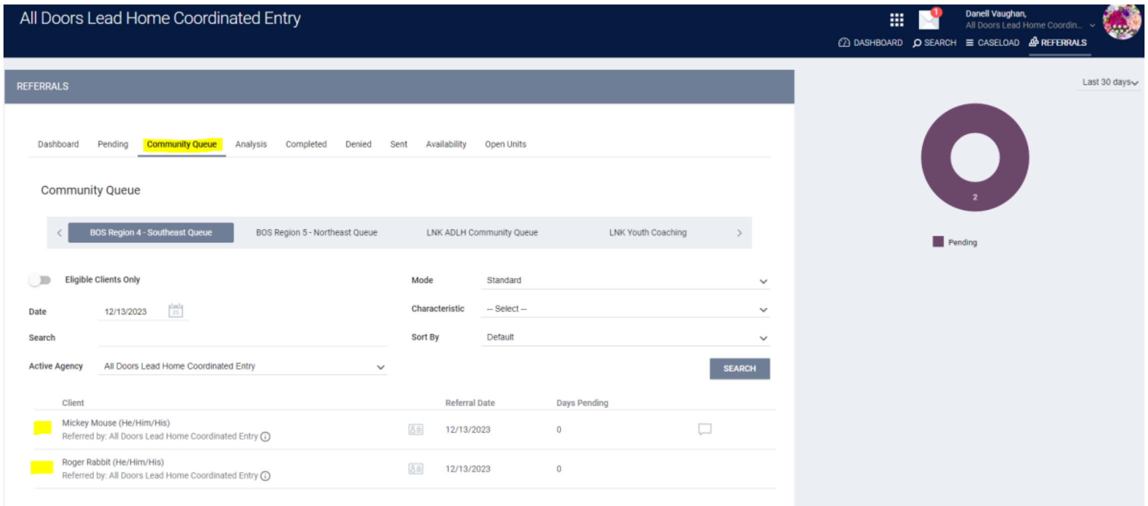


If you would like the script to help describe coaching for youth, please reach out to the Youth Program and Prevention Coordinator.

Coordinated Entry Workflow

Community Queue/Check Ins

To get to the Community Queues, click Search, and then Referrals at the top of the page.



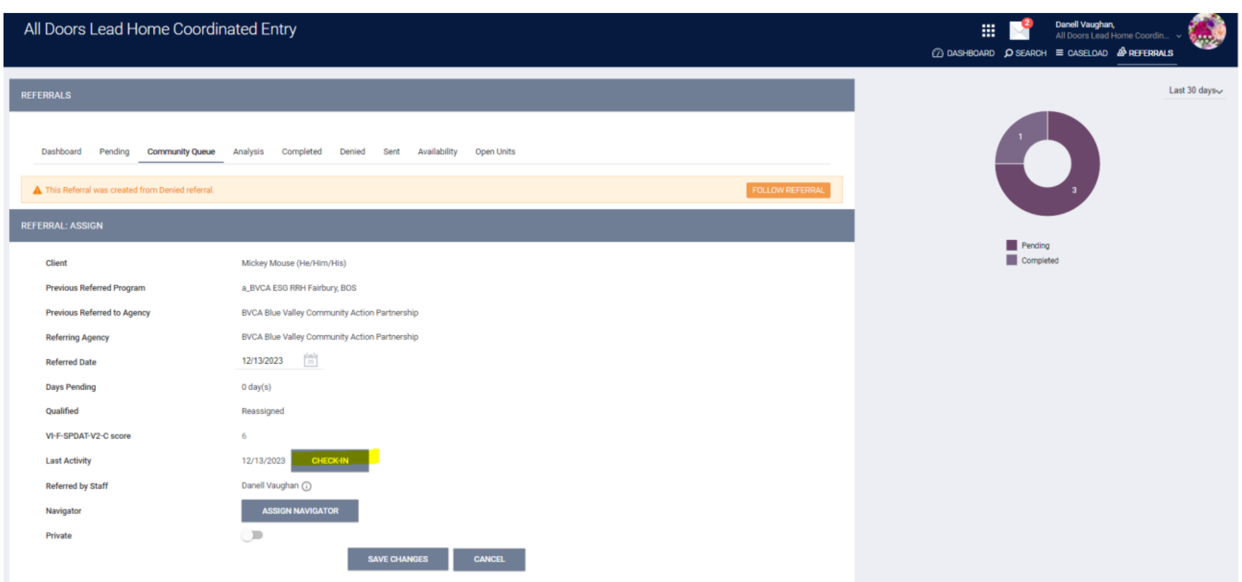
On the Community Queues, you will see all the clients referred to that queue. If you want to add a note to a client, you can click on the pencil next to the client's name. By hovering over the text box on the right, you can read the most recent note. The card icon will provide the client's defined characteristics such as Disabling Condition, Youth, Pregnant, and Fleeing DV.

Other parts of the Queue Screen:

- Mode: Allows you to filter by Assessment type. Selecting this will also allow you to filter by score range for PSH and RRH.
- Characteristic: Allows you to filter by Characteristic, such as Veteran, Youth, Disabling Condition, Fleeing DV, etc.
- Date: Allows you to search by date referred to the queue

Clients are required to check in weekly to stay active on the queue. Clients that have not checked in for 2 weeks or longer will be snoozed for 90 days. If there is no contact within those 90 days, the client will be exited from Coordinated Entry.

To check-in a client, click the Check In button. Check-ins are locked in at the bottom of the referral screen. Notes can also be added as the client continues to engage with your agency.

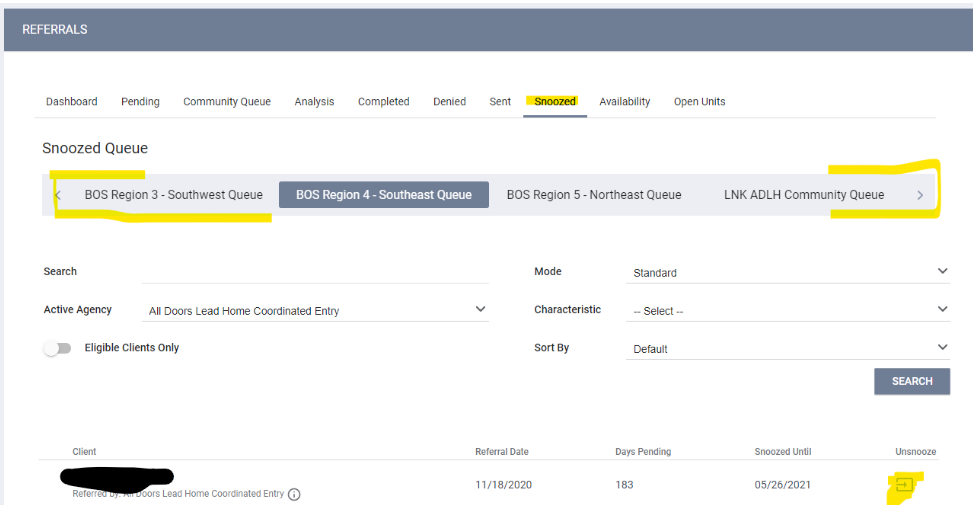


Coordinated Entry Workflow

Removing from Snooze

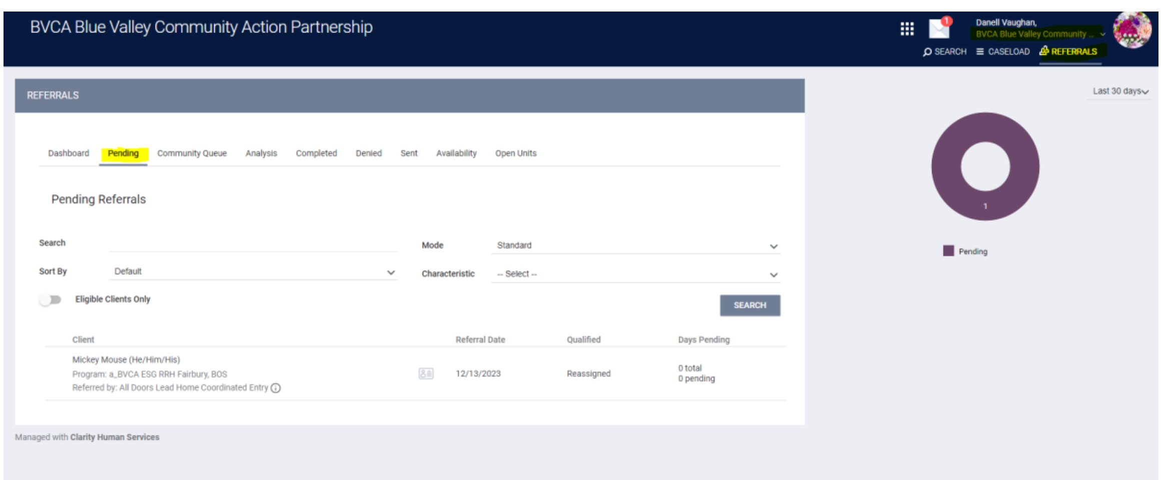
The Snoozed tab is broken down by region exactly like the Community Queues. A snoozed client can be found on the queue in which they were referred. To unsnooze, search for the client name, click the Arrow button for the client, and it will pull them back over to their assigned Community Queue. At that time, you can check them in and add a note updating their situation.

**It would also be beneficial to update the client's Current Living Situation at this time if there's not been contact for awhile.



Pending Tabs

Agencies can see their referrals under their Pending tab. To get to your agency Pending tab, change the agency under your name to your home agency, then click Referrals. It will automatically pull up your pending tab. Users can check in clients, add notes and update client information from the pending page.

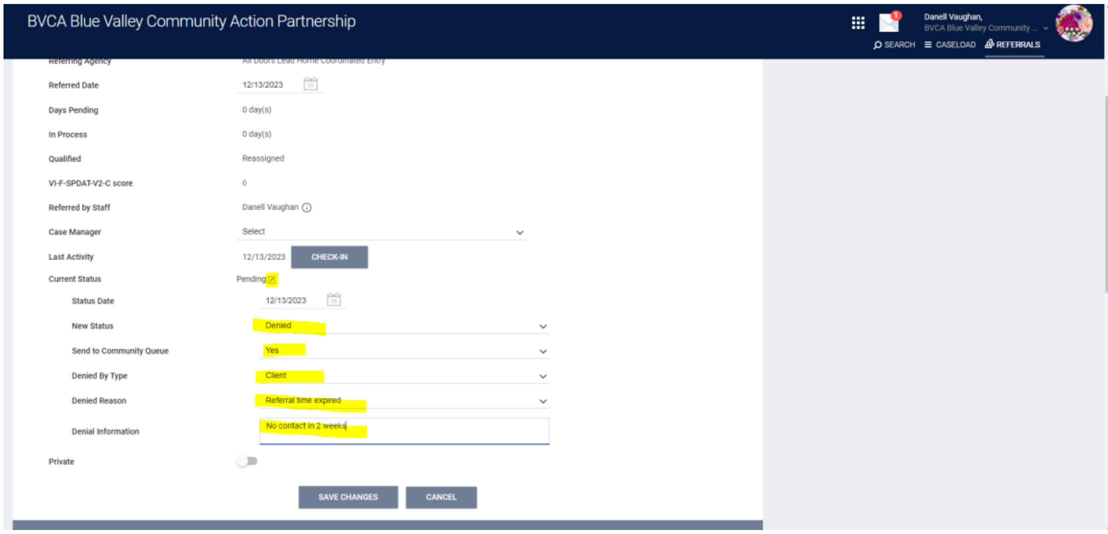


To Deny a client, click on the pencil next to Pending and complete the drop-down fields:

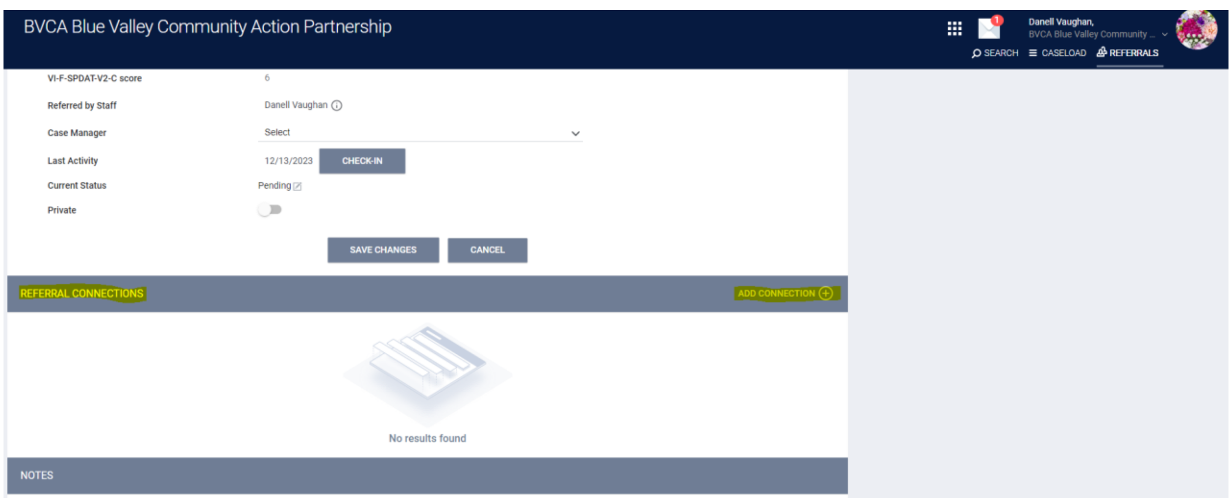
- **Send to Community Queue:** This should be Yes unless the client has been housed. In that case, select No, but you must also complete the exit for their ADLH CE enrollment.

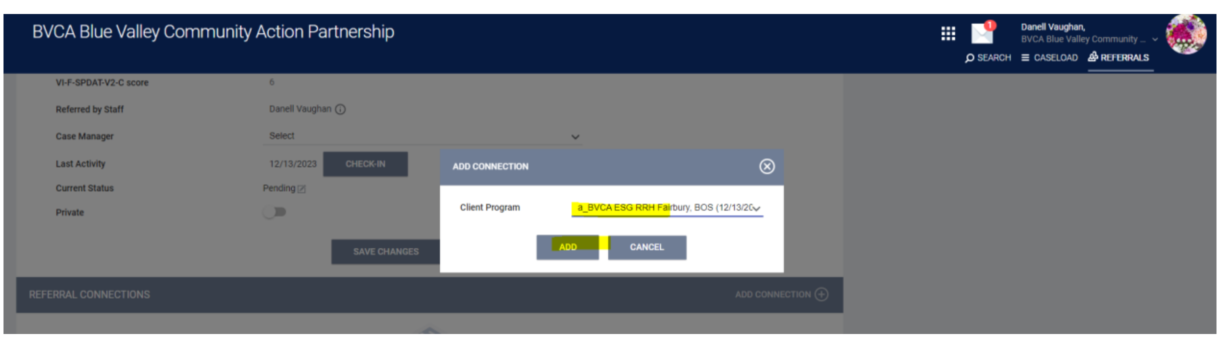
Coordinated Entry Workflow

- **Denied By Type:** This should be Client unless the agency is denying them due to the client not meeting agency eligibility requirements.
- **Denied Reason:** Select the most appropriate reason for the denial. Referral Time Expired should be used in situations in which there has not been contact for 2 or more weeks.
- **Denial Information:** Add a note clarifying why the client was denied (required).



If a client is on your pending tab but has been housed in your project, double check that the Move-in Date on the program enrollment has been completed. If that has been added, remove them by clicking Add Connection under Referral Connections. Make sure to select the Active program for the connection. If the program is not listed on the drop down, you will need to check to make sure an enrollment with move-in date has been completed for the client.





Coordinated Entry Workflow

Training video:

The training video can be found here:
https://unl.yuja.com/V/MediaFile?mediaFile=653558&node=41151501&a=526660225&autoplay=1

You will get a screen that looks like the one below. Click anywhere on the screen to start the video.