DURHAM COORDINATED ENTRY GUIDEBOOK

FOR FAMILIES MOVING FORWARD

Contents

Section: Receiving Referrals from Front Door

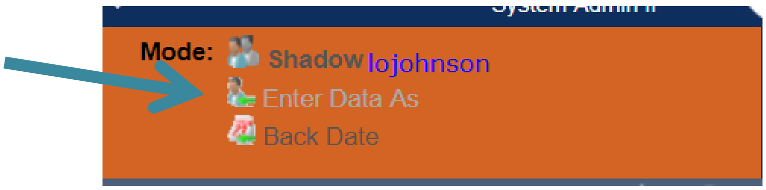
CE Central will send client referrals for both the Single and Families shelters for every entry. CE Central will contact the client with information about shelter intake procedures.

Step 1: Find Outstanding Referrals

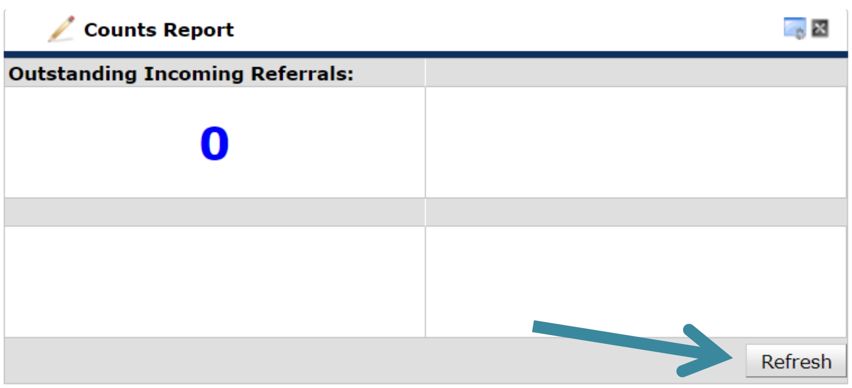
Shelter staff will then update the outcome of the Referral in HMIS by first finding the clients who were referred.

Find outstanding referrals via Dashlet

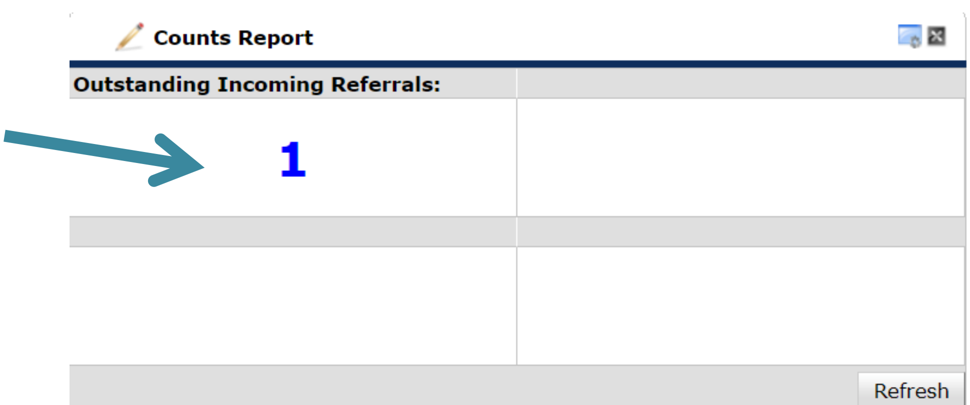
1. Confirm *Enter Data As* for the project you want to check incoming referrals for.



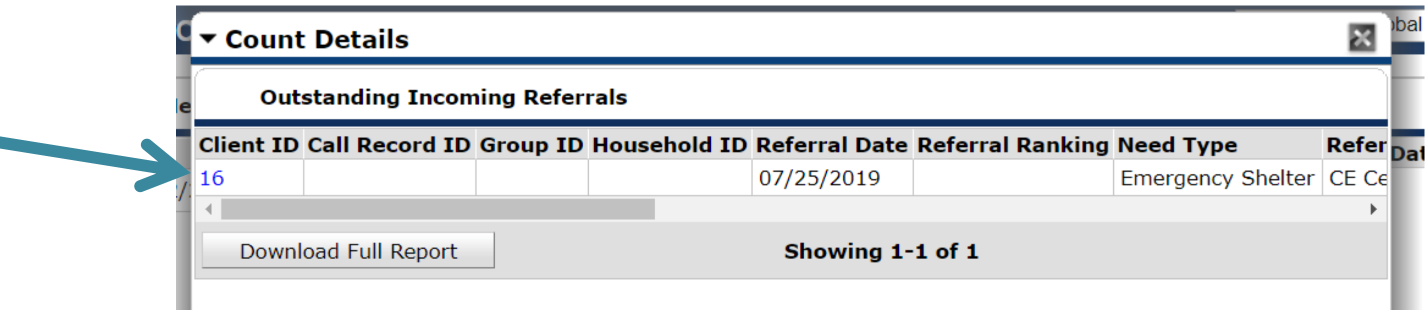
2. Click *Refresh* on *Counts Report Dashlet.*



3. Click blue hyperlinked number under *Outstanding Income Referrals* to check referrals for that project.

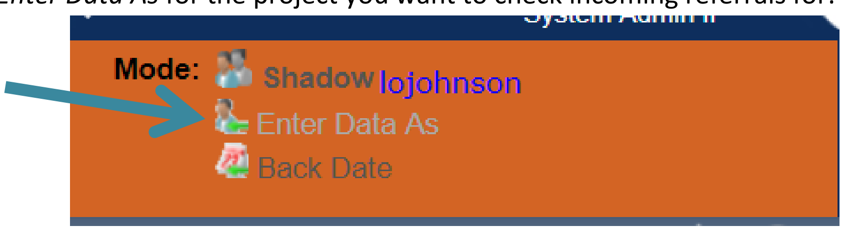


4. Click blue hyperlinked *Client ID* to navigate to *Client Profile* for entry and referral outcome updates.

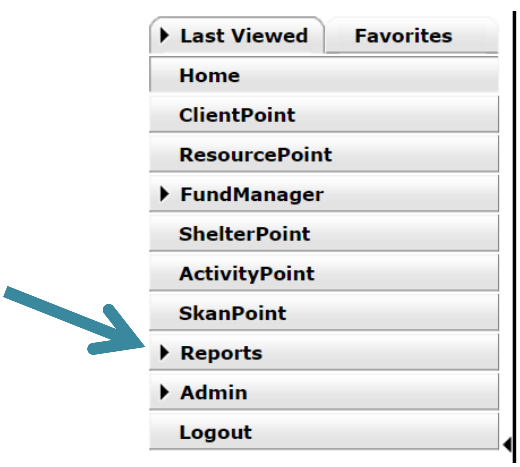


Find outstanding referrals via Referral Report.

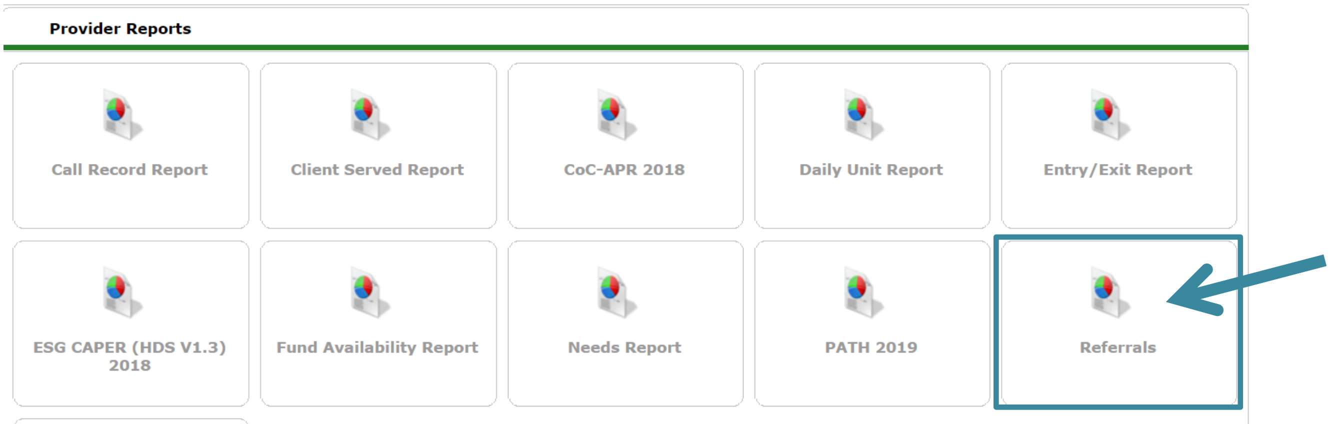
1. Confirm *Enter Data As* for the project you want to check incoming referrals for.



2. Click *Reports*.



3. Click *Referrals* report.



A. Complete report prompts

i. Ensure *Provider* is correct based on EDA mode.
*if provider does not auto populate correctly then you might not be in the correct EDA mode and this will impact your report.

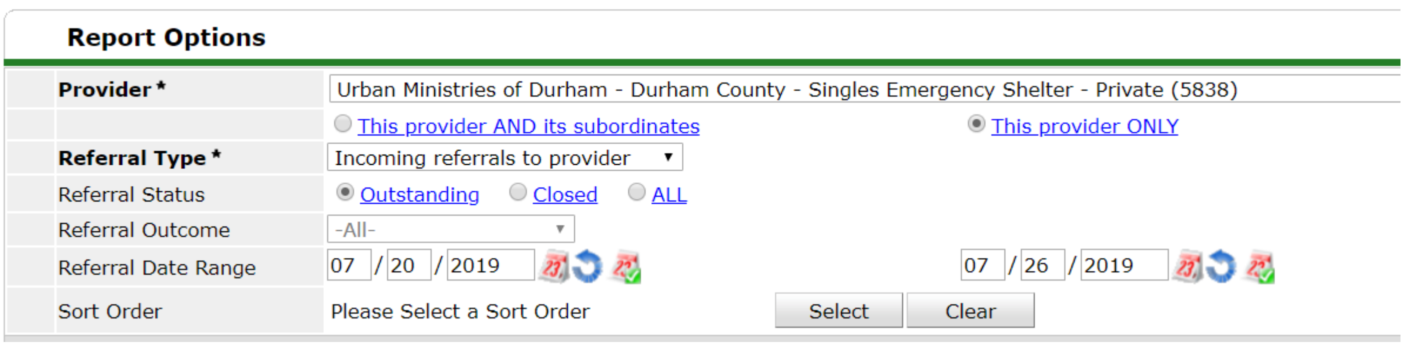
ii. Select *This provider ONLY.*

iii. Select *Incoming referrals to provider* from *Referral Type.*

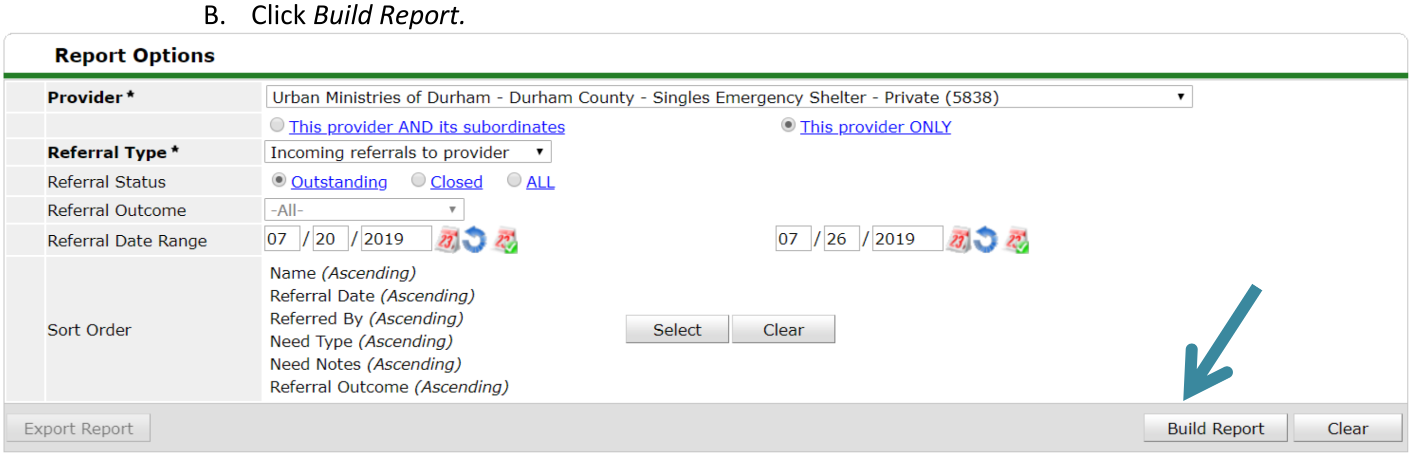
iv. Select *Outstanding* for *Referral Status.*

v. Enter your date range you want to check referrals for.

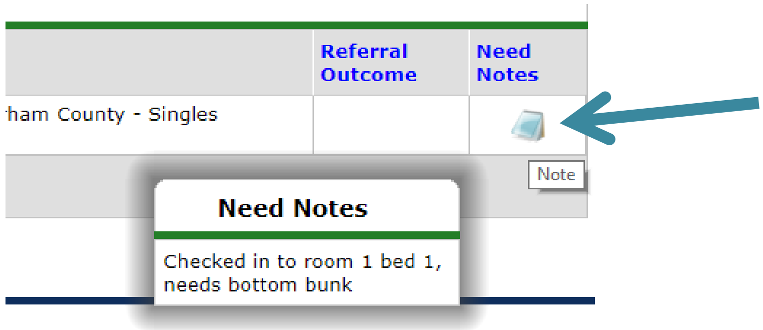
vi. Default *Sort Order* is by date, custom sorting is not required.



B. Click *Build Report.*



C. *Notes* may be viewed for clients by hovering the mouse over the notepad icon. CE Central staff will update the “notes section” with direction on the bed/room the client was placed in and household composition. Any additional needs they may have will also be identified here.



D. Review for outstanding referrals. Click blue hyperlinked *Name* and *Client ID* to navigate to *Client Profile* for entry and referral outcome updates.

Report Results

	Referral Date	Name	Group ID	Ranking	VI-SPDAT	TAY-VI-SPDAT	VI-FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
☐	07/25/2019 2:00:00 AM	(16) Ice Cream, Flavor of						Emergency Shelter	CE Central - Durham County - DSS Front Door	Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private		

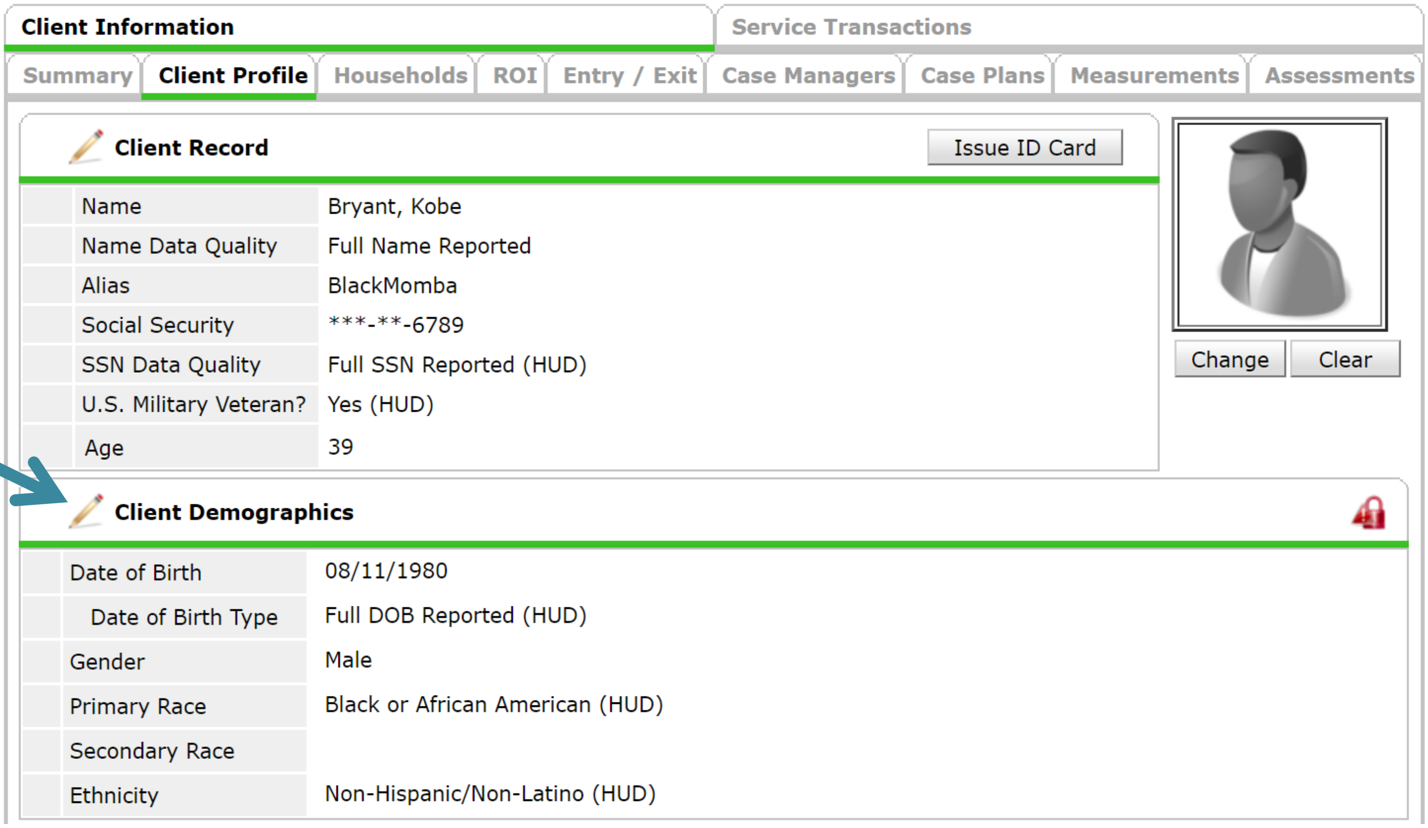
Select ALL | Clear | **Showing 1-1 of 1**

Step 2: Enter Clients into *ClientPoint*

If client/household presents at Shelter for intake, record their new Project Start/Entry into Shelter.

1. Identify the client(s) referred in the *Referrals Report* to know who has a room reserved
   a. Check the *Need Notes* for direction on the bed/room the client was placed in. And to know what additional needs they may have.

2. Go to *ClientPoint* to find and confirm or update the *Client Profile* tab
   a. Update *Client Demographics* if necessary
   b. Update *Client Contact Information* if necessary



Client Information | Service Transactions

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | Measurements | Assessments

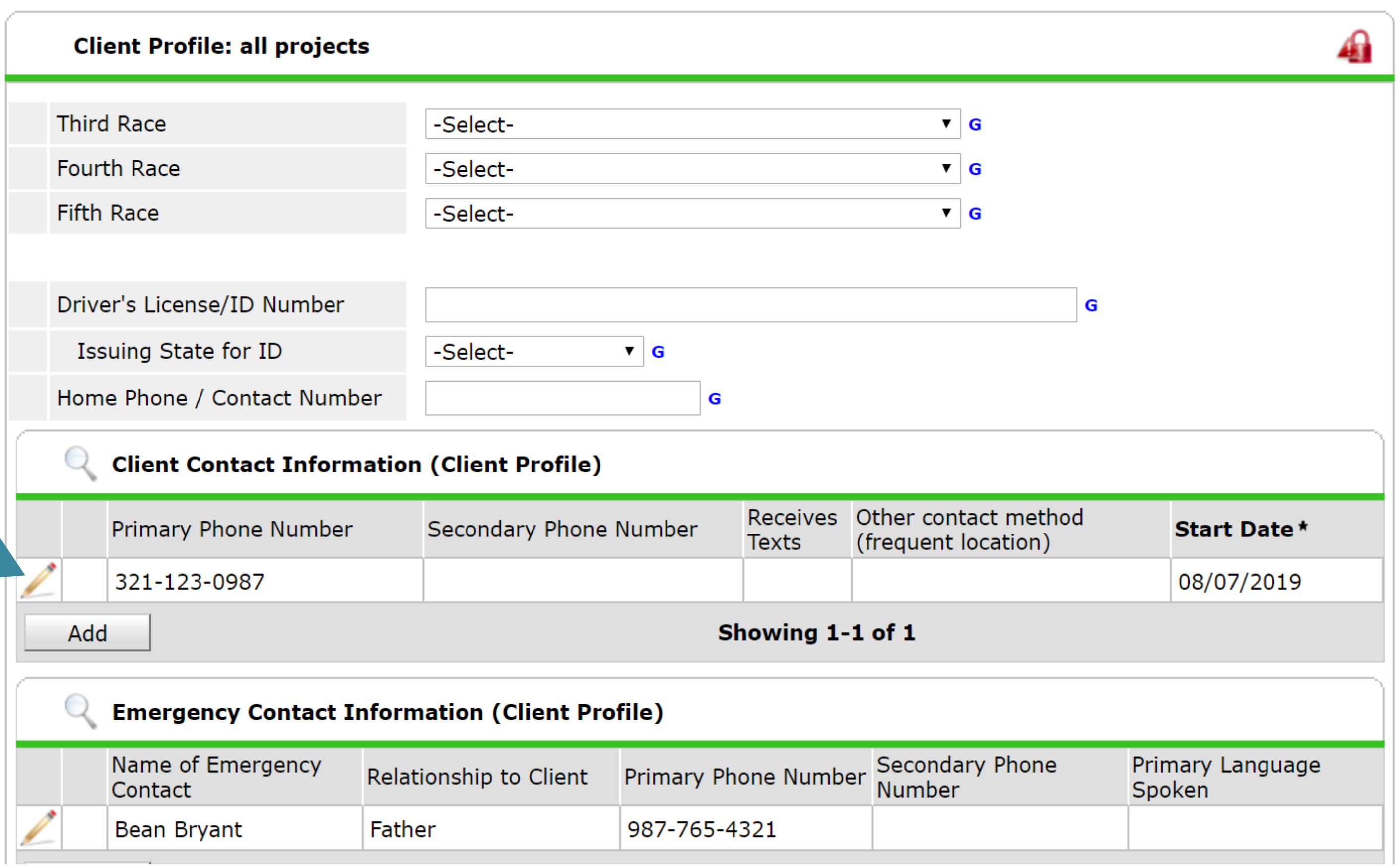
Client Record Issue ID Card

Name	Bryant, Kobe
Name Data Quality	Full Name Reported
Alias	BlackMomba
Social Security	***-**-6789
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	Yes (HUD)
Age	39

Change Clear

Client Demographics

Date of Birth	08/11/1980
Date of Birth Type	Full DOB Reported (HUD)
Gender	Male
Primary Race	Black or African American (HUD)
Secondary Race	
Ethnicity	Non-Hispanic/Non-Latino (HUD)



Client Profile: all projects

Third Race	-Select- G
Fourth Race	-Select- G
Fifth Race	-Select- G
Driver's License/ID Number	G
Issuing State for ID	-Select- G
Home Phone / Contact Number	G

Client Contact Information (Client Profile)

Primary Phone Number	Secondary Phone Number	Receives Texts	Other contact method (frequent location)	Start Date *
321-123-0987				08/07/2019

Add **Showing 1-1 of 1**

Emergency Contact Information (Client Profile)

Name of Emergency Contact	Relationship to Client	Primary Phone Number	Secondary Phone Number	Primary Language Spoken
Bean Bryant	Father	987-765-4321		

3. Add the household with complete information
    i. On the *ROI* tab, complete the Electronic ROI for all household members

ii. On the *Entry/Exit* tab, complete full Intake assessment (Project Start: ES) for all household members

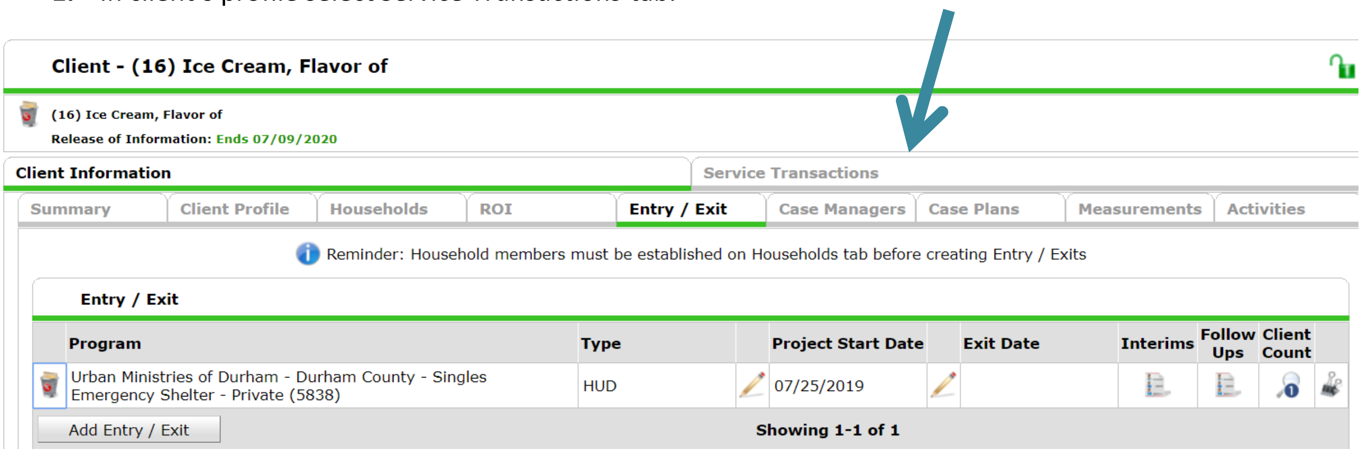
iii. Confirm that all household members have appropriate Project Start

Step 3: Update Referral Outcome

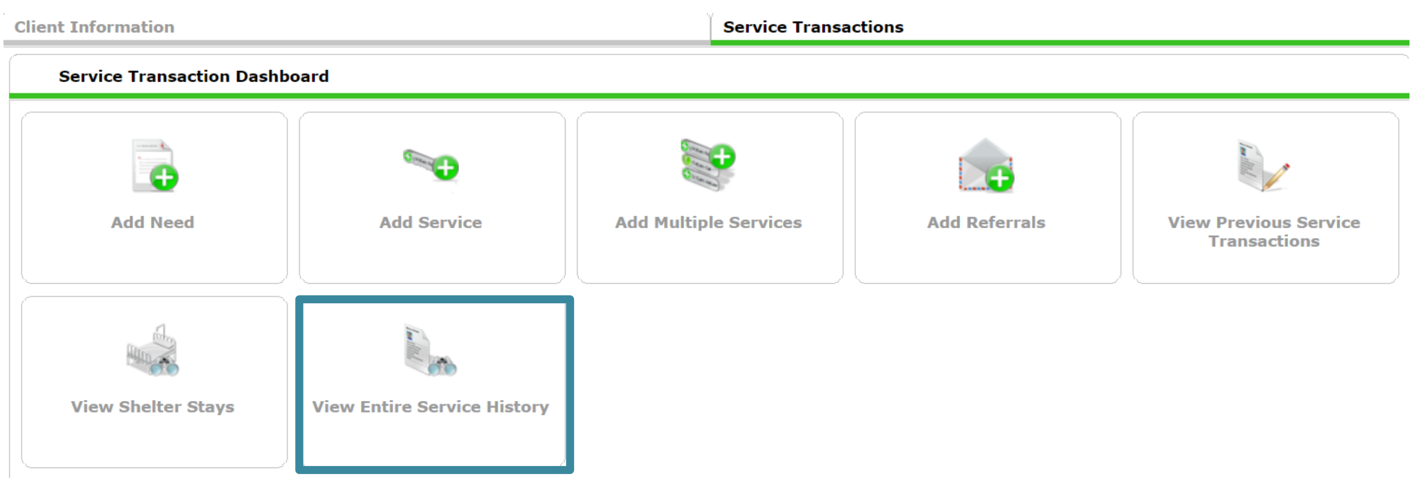
The outcome of every referral must be recorded in HMIS.

Update Referral Outcome through *ClientPoint*

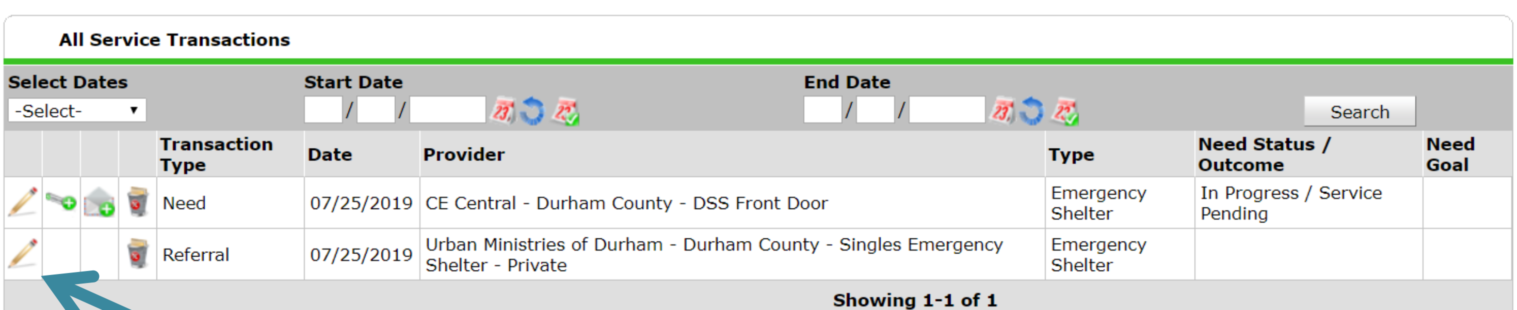
1. In client's profile select *Service Transactions* tab.



2. Click *View Entire Service History*.



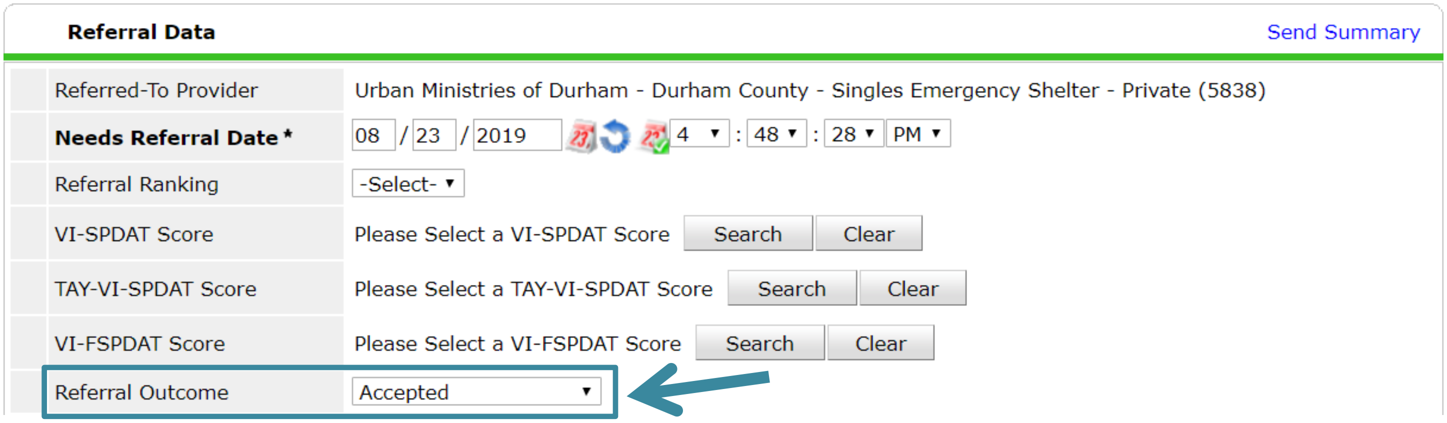
3. Find the appropriate referral from the CE Front Door project and click the edit pencil on that row.



				Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
				Need	07/25/2019	CE Central - Durham County - DSS Front Door	Emergency Shelter	In Progress / Service Pending	
				Referral	07/25/2019	Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Emergency Shelter		

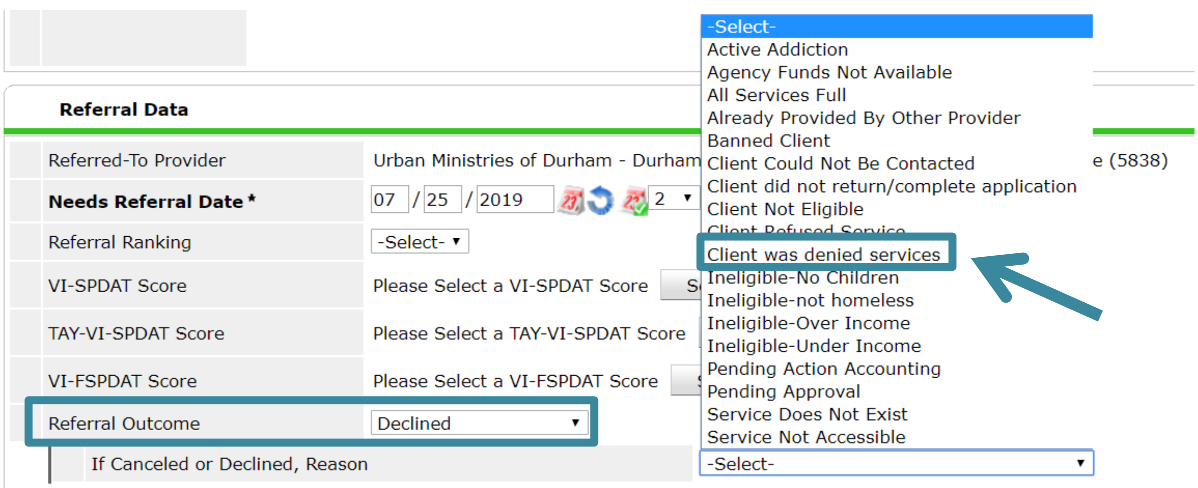
4. Scroll to the *Referral Data* section and update the *Referral Outcome* to either *Accepted* or *Declined* or *Cancelled*.

   A. **If client/household completes shelter intake**
      i. Confirm the outcome of the referral as *Accepted*



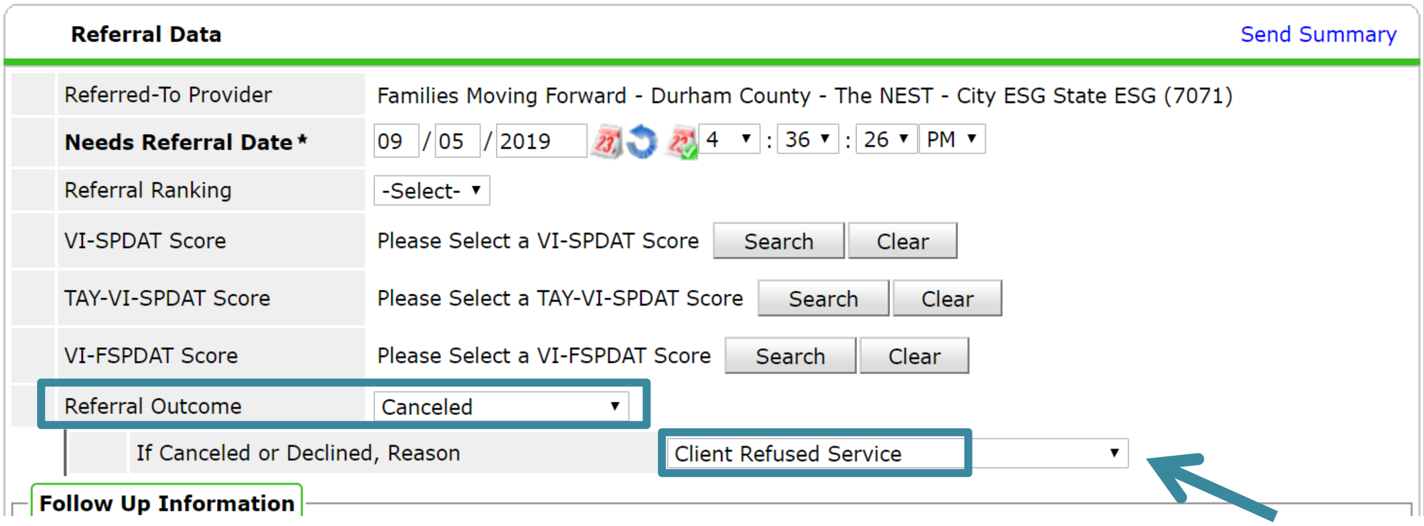
   B. **If client/household is a No-Show**
      i. Confirm the outcome of the referral as *Canceled* and the reason as *Client Did Not Return*
      ii. Include the bed the client had been placed in, into the Vacancy form

   C. **If client/household is declined by Shelter (and never gets to Intake)**
   D. Confirm the outcome of the referral as *Declined* and the reason as *Client was denied services*



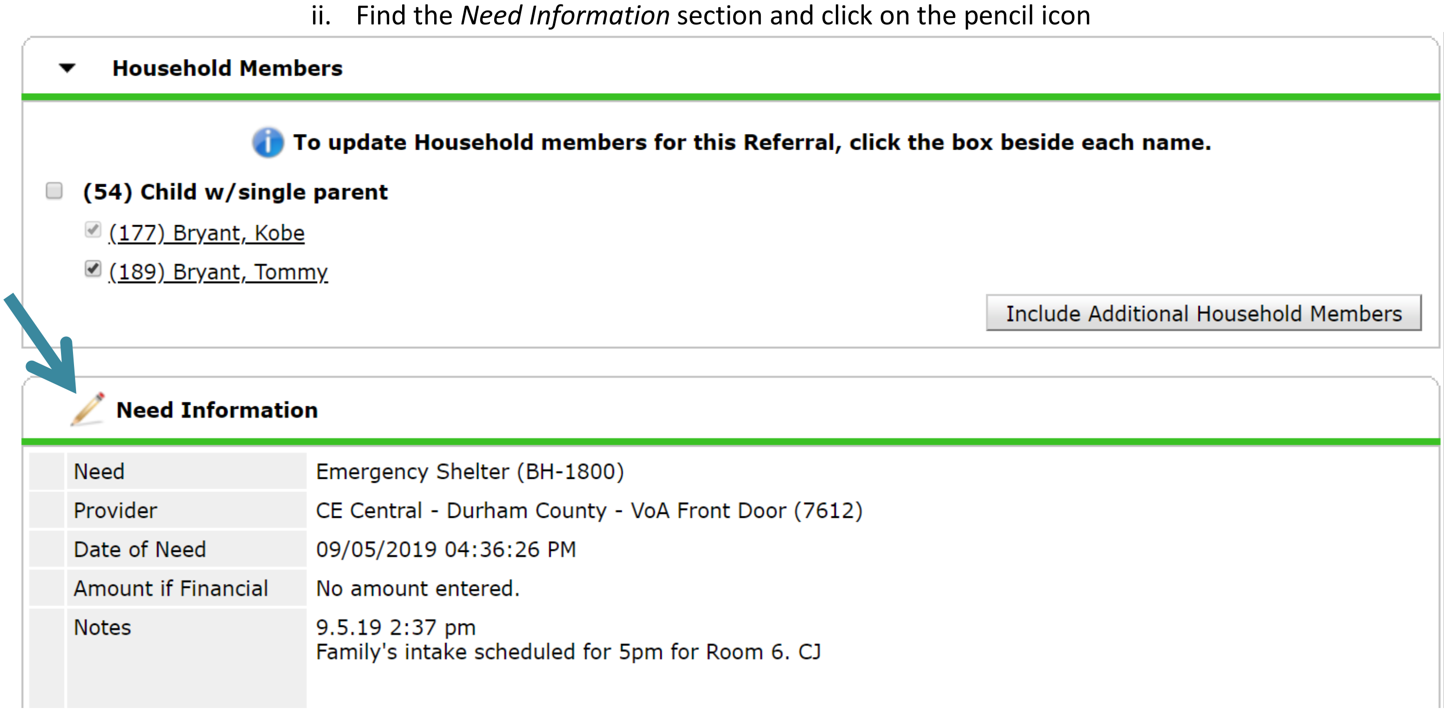
      i. Include the bed the client had been placed in, into the Vacancy form

   E. **If client/household is cancels Shelter**
      i. Confirm the outcome of the referral as *Canceled* and the reason as *Client Refused Service*
      ii. *Save and Exit* the referral



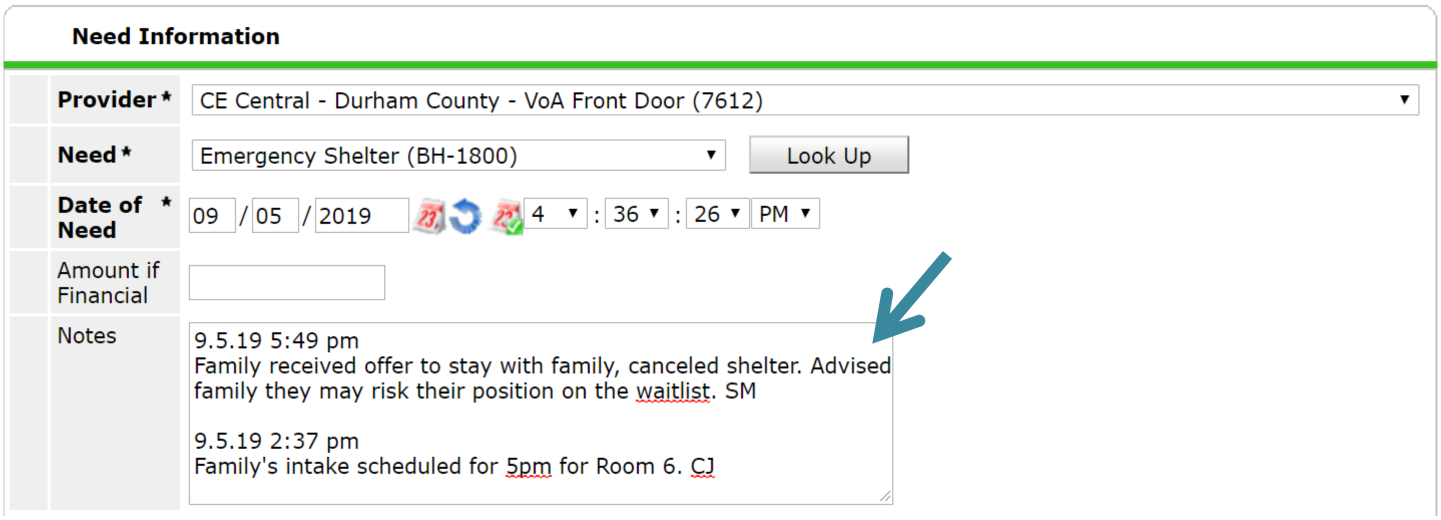
i. Find the *Need Information Notes* to edit with additional information the client gave you
    1. Click on the pencil icon next to the referral (yes, it’s the one you just edited)

ii. Find the *Need Information* section and click on the pencil icon



iii. Add notes about the client’s reason for canceling, where they will stay tonight, and whether they want shelter tomorrow. Make sure they are properly formatted.
    1. New notes will go above the previous notes
    2. The first row of the note will be the Date and Time
    3. The second row will be the note information and your initials

iv. Click *Save & Exit*



v. Include the bed the client had been placed in, into the Vacancy form

Referral Outcome Reference Table

The table below lists how to respond is all four types of situations after a referral is made. There are more options available in the Referral Outcome Reason, but only use the options below.

Referral Result	Referral Outcome in HMIS	Referral Outcome Reason in HMIS
Intake happens	Accepted	-
Client declines shelter	Canceled	Client Refused Services
Shelter declines client	Declined	Client was denied services
Client no-shows	Canceled	Client did not return

Step 4: Update Shelter Customized Questions

If the client's Referral is successful, continue to the shelter's customized questions.

1. Go to the Assessments tab
2. The Default Assessment will be your Shelter's customized questions
3. Complete the questions appropriately and Save & Exit

Section: Exiting a Client

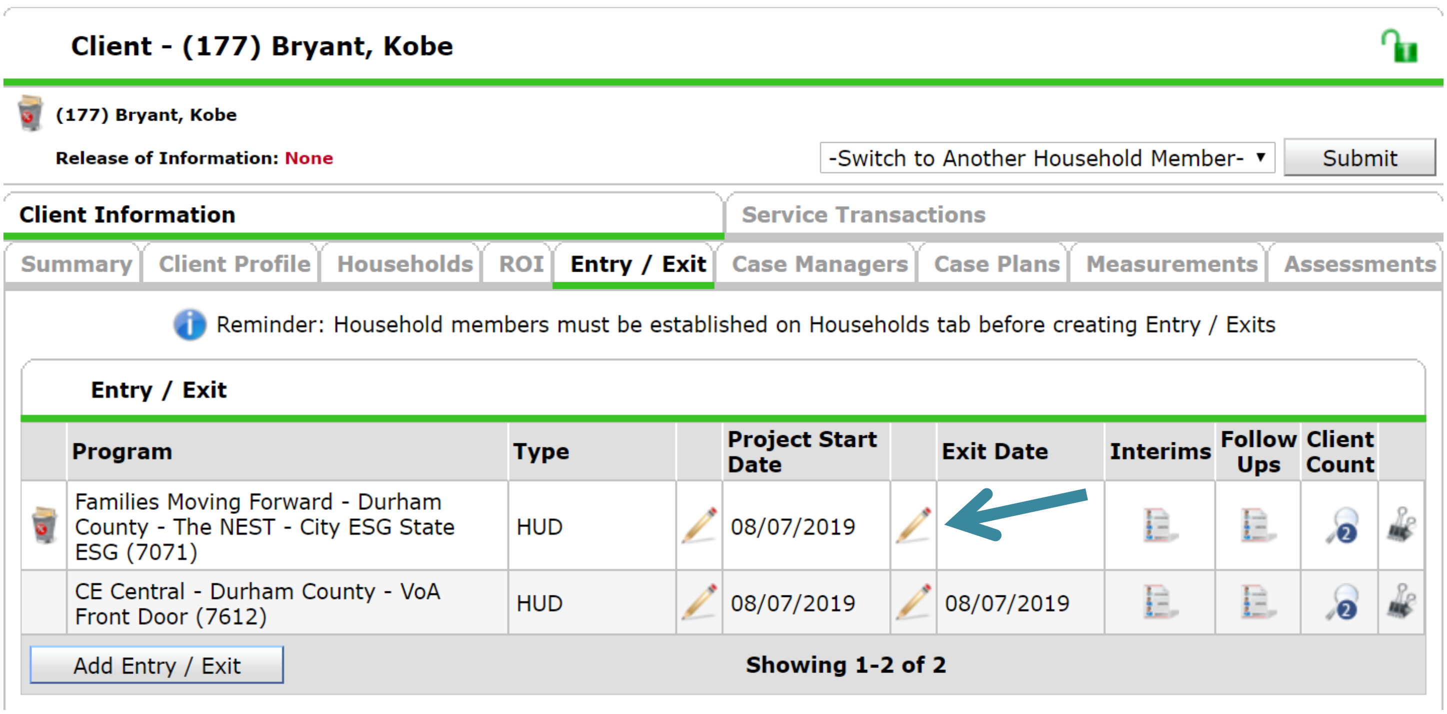
In HMIS, clients should have continuous Entries for every night they stay in the shelter. When a client no longer uses a bed, they should be Exited. Whether clients leave for positive, neutral, or negative reasons, the steps to exit clients from HMIS.

1. Once logged into HMIS, confirm EDA for the correct shelter project

2. Confirm the correct date is selected.
   a. If the client stayed last night, but left sometime today, you don't need to change the date.
   b. If the client did not stay last night and did not exit today, change Backdate mode to the correct date.

3. Go to *ClientPoint* and find the correct project entry row for this client/household

4. Click on the pencil next to the blank *Exit Date* to exit the household (make sure all appropriate household members have their boxes checked)

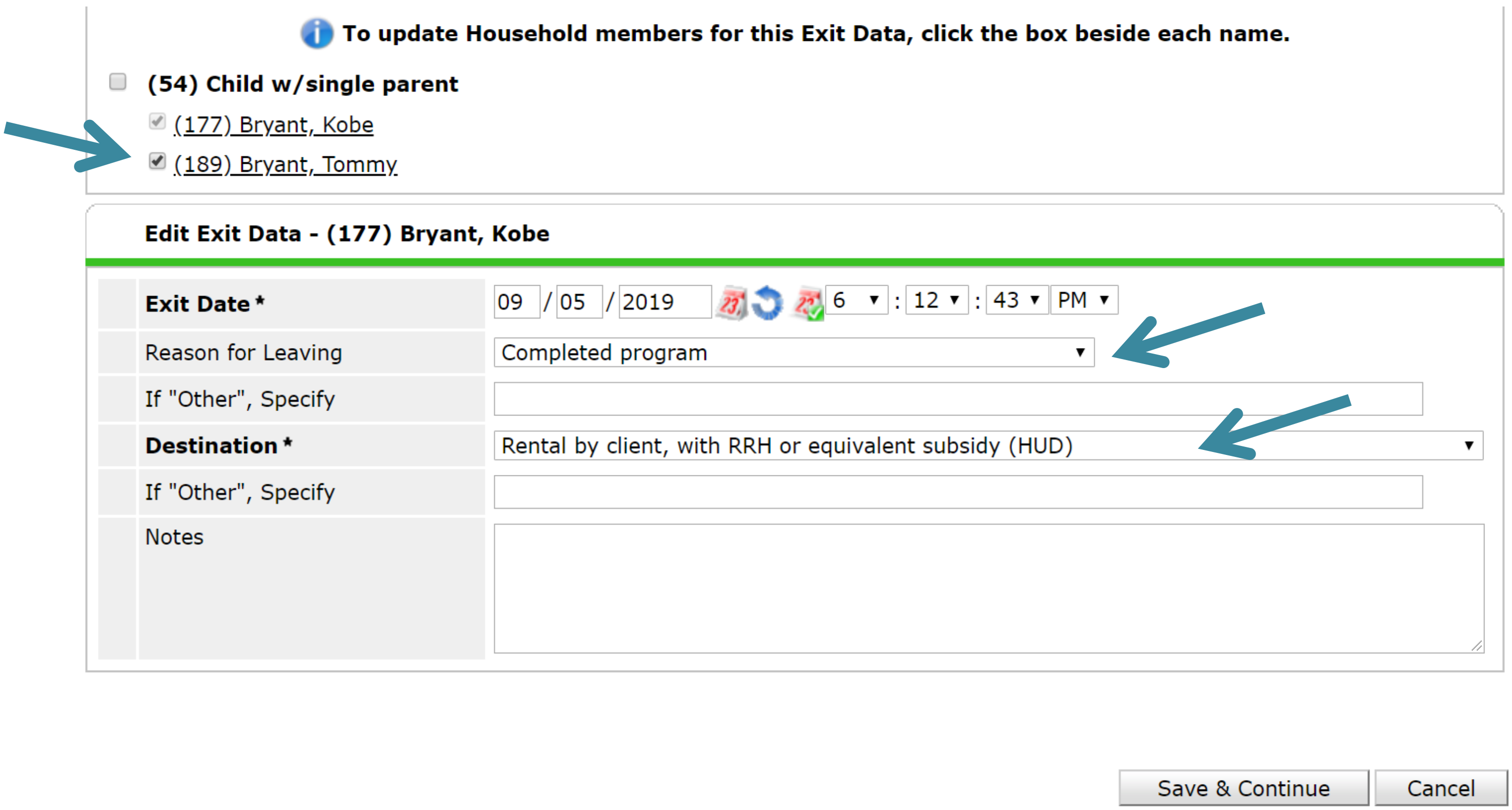


5. Record the most appropriate response for *Reason for Leaving* and *Destination*.
   a. Common Reasons for Leaving:
      i. *Completed program* is when a client leaves after moving into housing with support from the shelter
      ii. *Left for housing opp. before completing program* means that the client found other housing without direct support from the shelter
      iii. *Unknown/Disappeared* is used when shelter staff do not know the reason for leaving
   b. Common Destinations:
      i. *Place not meant for habitation* is used when the client is returning to a Literally Homeless situation (not shelter)
      ii. *Emergency Shelter, including hotel or motel stay paid for with emergency shelter voucher* refers to a temporary location paid for by the shelter or another community non-profit
      iii. *Hotel or motel stay paid for without emergency shelter voucher* is when the client pays for a temporary location themselves

iv. *Permanent Housing (other than RRH) for formerly homeless persons* refers to Permanent Supportive Housing or Other Permanent Housing that does not require a disability but is dedicated to folks experiencing homelessness

v. *No Exit Interview Completed* is used when no information about where the client is sleeping that night is available

c. Click *Save & Continue*



d. Complete the Exit Assessment for Head of Household and Adults with the most up to date information

e. Confirm that Disabling Condition, Health Insurance, Income, and Non-Cash Benefits are up to date

6. If additional information is available, go to *ClientPoint* and navigate to the client's profile.
    a. On the *Client Profile*, confirm or update the client's contact information or emergency contact information
    b. Update any other information from *Client Notes* to *Service Transactions* from the client's profile

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Section: Shelter Suspensions

Clients can be suspended from shelter following the Durham Coordinated Entry Policies and Procedures.

Step 1: Review Policy and Procedures

1. Confirm that client engaged in qualifying incident according to the policies and procedures.

2. Confirm that all required actions by staff have been taken appropriately.

3. Determine the length of referral suspension according to policies and procedures specifications.

4. Complete required Shelter Referral Suspension Form. Find the form on ncceh.org/durhamce.

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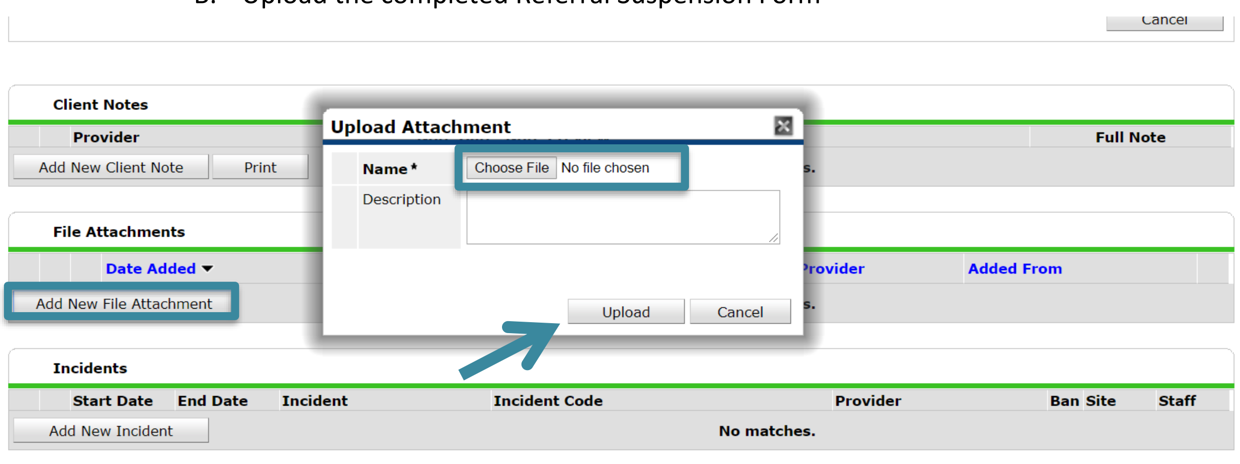
Step 2: Add Incident to alert CE Central

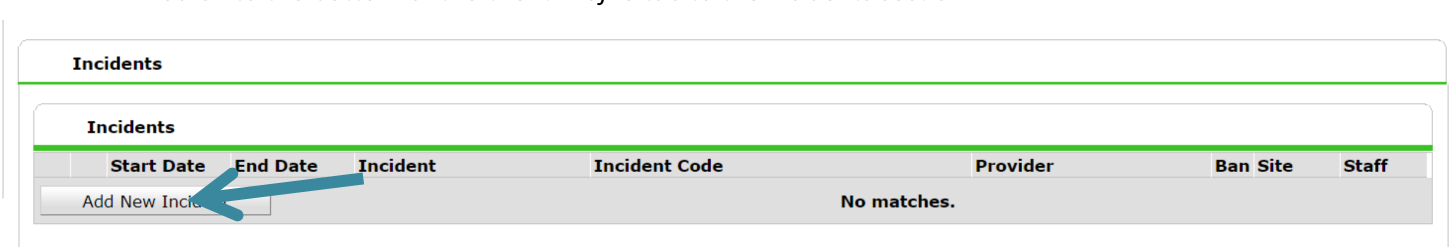
1. Log in to HMIS, EDA into the correct shelter project and navigate to *Client Profile* via search.

2. Confirm the correct date is selected
   A. If the incident occurred today, you don't need to change the date.
   B. If the incident was not today, change Backdate mode to the correct date.

3. Go to *ClientPoint* and navigate to the *Client Profile*
   A. Scroll down to the File Attachments section
   B. Upload the completed Referral Suspension Form

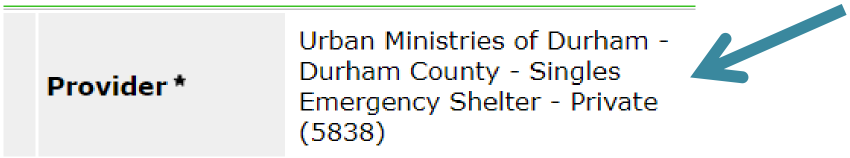


4. Scroll to the bottom of the *Client Profile* tab to the *Incidents section*.

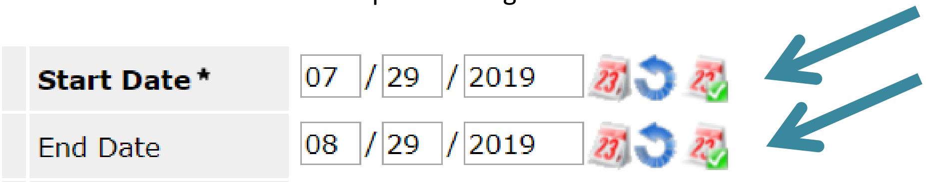


5. Click *Add New Incident.*

6. Confirm that *Provider* is correct *if *Provider* is not correct your EDA mode is probably not correct and needs to be changed.



7. Add *Start Date* for date the suspension begins and *End Date* for when it ends.



A. Qualifying incidents for shelter referral suspensions with maximum lengths.

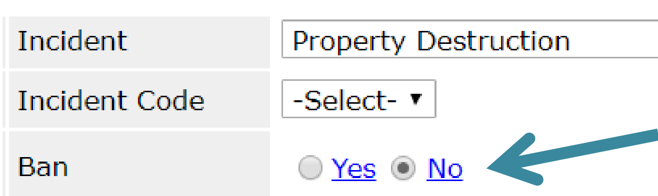
Credible verbal threat to do physical harm or stalk	Maximum 3 mo
Acted with intention or result for doing physical harm or stalking	Maximum 1 year
Unauthorized guest who endangered safety of others on premises	Maximum 2 mo
Had a weapon in possession onsite	Gun- Maximum 1 year
	No Gun- Maximum 6 mo
Sexual harassment or sexually inappropriate behavior	Maximum 6 mo
Gang activity onsite	Maximum 6 mo
Possession of illegal substances onsite	Maximum 2 mo
Engaged in illegal activity with intention/result of selling controlled substances	Maximum 2 mo
History of intimate partner or family violence against client currently in shelter that poses credible threat	Remove the survivor to shelter run by victim

	service provider and remove suspension

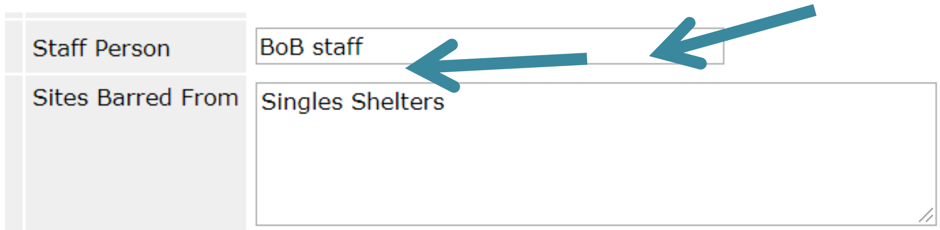
8. Select *Incident* from the picklist based on list provided below for suspension incidents.

Durham Suspension Reason	**Possible incident picklist option(s)**
Made a credible verbal threat to do physical harm to or stalk another shelter resident, staff member, or visitor	credible verbal threat
Took action with the intention or result of doing physical harm to or stalking another shelter resident, staff member, or visitor.	violent behavior
Took action with the intention or result of destruction or theft of onsite property.	property destruction and/or theft
Brought an unauthorized guest onsite whose presence endangered the safety of other people on the premises.	unauthorized guest
Had a weapon in their possession onsite. Shelters should have a policy that specifically defines items banned as weapons on premises.	weapon possession
Engaged in sexual harassment of another person or engaged in sexually inappropriate behavior. Shelters should have a policy against sexual harassment that specifically describes banned behaviors.	inappropriate sexual behavior
Engaged in gang activity onsite	gang activity
Possessed illegal substances onsite.	possession or use of illegal substances
Engaged in illegal activity with the intention or result of selling controlled substances onsite	soliciting or selling illegal substances
Has a history of intimate partner or family violence perpetration against another client (aka: survivor) currently in the shelter and serving the client in question would pose a credible and imminent threat to the survivor.	Potential DV/IPV Issue

9. Leave *Incident Code* blank and *No* for *Ban.*



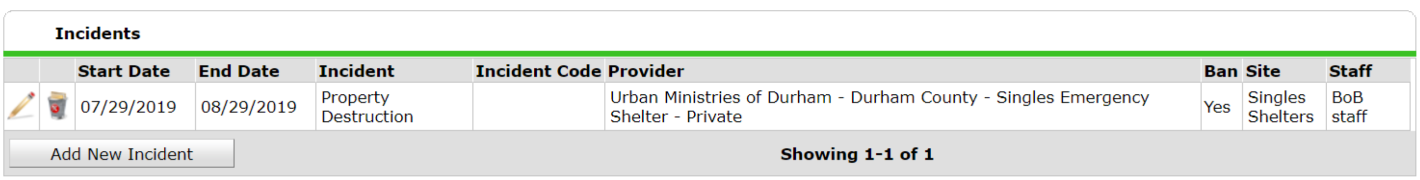
10. Complete *Staff Person* for staff completing the form and *Sites Barred From* for appropriate shelters.



11. Add additional *Notes* if needed.

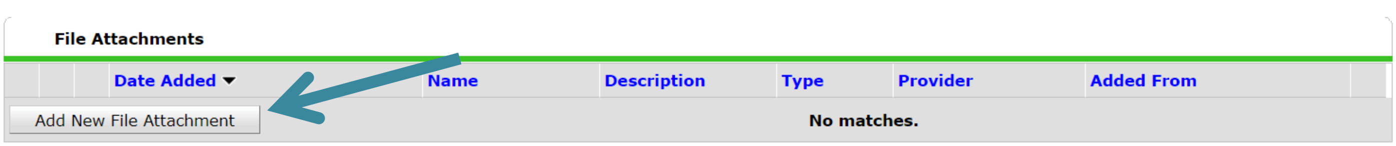
12. Click *Save.*

13. Confirm *Incident* shows up on *Client Profile.*

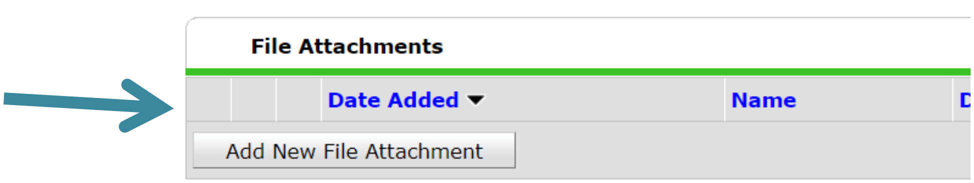


Step 3: Upload Shelter Referral Suspension Request Report to Client Profile

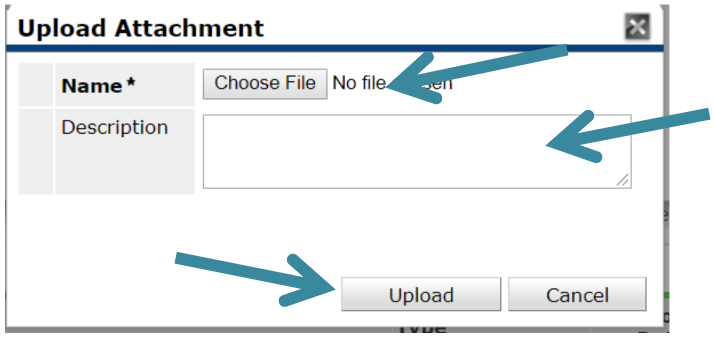
1. In *Client Profile* scroll to the File Attachments section.



2. Click *Add New File Attachment.*



3. Click *Choose File* and select appropriate Shelter Referral Suspension Request Report that has been completed, add a *Description* stating Shelter Referral Suspension Request Report (date suspension starts) and click *Upload*.



4. Confirm attachment shows up appropriately.

5. Alert CE Admin for form/suspension review as needed.

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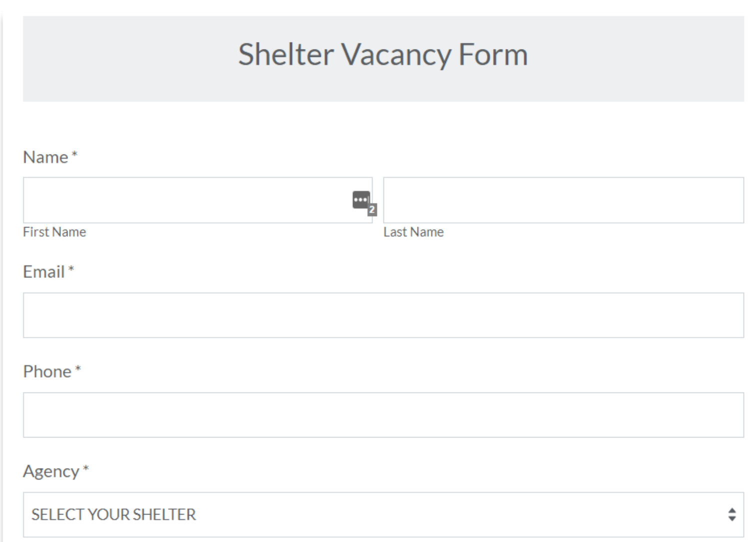
Section: Submit Shelter Vacancy Form

Once a room or bed is available for a new clients, shelter staff will notify CE Central through the Vacancy Form.

1. Go to ncceh.org/durhamce to find the Vacancy Form link

2. Complete the contact information on the Vacancy Form



3. Select the shelter you are reporting a vacancy for and complete the details that appear

4. At the bottom, record any additional notes that you think CE Central would find helpful to sending the next referral

5. Click *Submit* and check your email for a confirmation of the form submission