Durham Coordinated Entry Guidebook

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Section: Entry Point Diversion and Shelter Bed Referral Workflow Summary

When a client presents at Entry Point, the following steps summarize the steps Entry Point staff will take:

1. Confirm eligibility (as listed below), gain consent, disclose mandatory reporting.
2. Begin HMIS data entry.
3. HARK assessment and safety planning.
4. Diversion conversation.
    a. If client can be diverted, conduct follow-up case management if diversion is temporary.
5. Conduct HOPWA screen, Veteran screen for potential diversion resources.
6. If client cannot be diverted, explore shelter options.
7. Conduct medical vulnerability screen, explore special population shelter options.
8. If shelter beds are available, refer to shelter. If not, put on shelter wait list.
9. If client refuses shelter and is unsheltered, conduct VI-SDPAT and screen for SOAR eligibility.
10. Follow up with client if referral is unsuccessful (shelter declines, client declines, no-show).

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Section: Eligibility

Eligibility for Entry Point Services

To receive services from Entry Point, persons must be Category 1, Category 2 or Category 4 Homelessness as defined below. All others should receive referrals to other resources in the community.

Category 1 Homelessness (Literal Homelessness): A state in which a person lacks a fixed, regular, and adequate nighttime residence, as defined by one of the following conditions:

a. An individual or household has a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings, including a car, park, abandoned building, bus or train station, airport, camping ground; or

b. An individual or household is living in a supervised publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state, or local government program for low-income individuals); or

c. An individual or household is exiting an institution where he or she resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution.

Category 2 Homelessness: When a person or household will imminently lose their housing (within 14 days), no subsequent residence has been identified, and the person or household lacks the resources or support networks needed to obtain other permanent housing.

Category 4 Homelessness: When an individual or household is fleeing, or attempting to flee domestic violence, has no other residence; and lacks the resources or support networks to obtain other permanent housing.

Eligibility for Shelter Referral

To receive a referral to Urban Ministries of Durham or Families Moving Forward, a household must meet the following eligibility requirements:

1. Experiencing homelessness (as defined in Eligibility for Entry Point Services)

2. Participated in a diversion conversation at Entry Point. A diversion conversation must precede any shelter referral.

3. Durham resident (as defined below) OR
Person experiencing Category 1 homelessness in Durham County OR
Person experiencing Category 4 homelessness in Durham County OR
Person being relocated by HUD to Durham County by a natural disaster.

4. Not on sex offender registry. Check https://www.nsopw.gov.

5. Not currently suspended from shelter.

6. Households must also meet the household composition requirements for each shelter (i.e. a single adult household cannot be referred to Families Moving Forward or a family with children cannot be referred to UMD's adult shelter).

Durham residency defined:

A household is a Durham resident if they meet one of the following conditions:

1) Possesses a Durham ID.

2) Has slept within Durham County for the previous 30 days or more (including institutional stays like jail, prison, or health care institutions in Durham County), with interruptions of no more than 3 consecutive days.

- If someone has lived in Durham their whole life or for a long time, they meet this criterion.
- If someone very recently came to Durham, count how many consecutive days they have lived in Durham. If they left Durham for 3 days or less, continue to count consecutive days of residency. If they left for more than 3 days, start over. For example:

- It is August 1. Joe says he started living in Durham on July 1. He says he lived in Alamance County for 7 days in the middle of July. That means he is NOT currently a Durham resident: because his break in residency was 7 days, start counting his total time in Durham from the end of his stay in Alamance County.

3) Had slept within Durham County for at least 30 days with interruptions of no more than 3 days immediately before an institutional stay outside of Durham County from which the client was released no more than 29 days previously.

- This is for people returning to Durham after they were in an institution in another county (like prison or a health care institution).
- If they were in Durham before they left for 30 days or more, and are now coming back to Durham, they are still counted as a resident.
- To count under this criteria they must have been released from the institution at most 29 days ago.

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Section: Mandatory Reporting

All staff of Front Door Units that meet with clients are mandatory reporters for child abuse and neglect, senior abuse and neglect, and abuse and neglect of people with disabilities. Before beginning any client intake, Front Door Units must disclose that they are mandatory reporters and explain what this means. Clients should be specifically given information regarding mandatory reporting in cases in which a child is present during intimate partner violence or substance abuse.

Staff should complete the online Child and Protective Services training prior to interacting with clients. https://www.dconc.gov/government/departments-f-z/social-services/protective-services-training-kits/child-protective-services-training-kit

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Section: HARK and Safety Planning

Entry Point staff should screen all clients for experiences of violence using the modified HARK screen tool, below.

- Clients who proactively disclose experiencing/fleeing violence do not have to be screened
- Clients may refuse to be screened
- Clients presenting with additional adults, especially couples, should not be screened for safety reasons

Entry Point staff should explain their mandatory reporting responsibilities before starting the screen. This disclosure should include an explanation that Entry Point staff must report when a child witnesses' domestic violence.

Modified HARK Screen Tool	Yes	No
Within the last year, have you or a member of your household been humiliated or emotionally abused in other ways by a partner or ex-partner?		
Within the last year, have you or a member of your household been afraid of a partner, ex-partner, or anyone else you lived with?		
Within the last year, have you been raped or has anyone forced you to have any kind of sexual activity?		
Within the last year, have you or a member of your household been kicked, hit, slapped, or otherwise physically hurt by a partner, ex-partner, or anyone else you lived with?		

If the client answers yes to at least one question, they screen positive. Clients who screen positive for intimate partner or family violence or sexual abuse should be offered a referral to a victim service provider or providers appropriate for the client's stated needs. If client accepts the referral, the staff member should offer to sit with the client while they call. The phone number for Durham Crisis Response Center is:

919-403-6562 (English)
919-519-3735 (Español)

If a client declines the offer, the client should be offered the contact information for the victim service provider or providers. If the client accepts the offer of contact information, a staff member should discuss safety precautions with the client to ensure that the information does not further endanger the client.

If a client declines to call DCRC or another victim service provider, Entry Point staff should develop a safety plan with the client while they work on diversion and shelter placement.

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Section: Daily Waitlist Management Summary

Every morning and when new vacancies are reported Entry Point staff will first refer clients to open shelter beds from the waitlist. To pull a referral from the wait list, Entry Point staff will follow these steps:

1. Update shelter vacancies in the *Bed Placement* Inventory Project in HMIS.
2. Update client records in HMIS to resolve all referrals from the previous day.
3. Pull the *Waitlist Prioritization Report* and sort waitlist.
4. Review HMIS records of clients to find Communication and Contact information
5. Call and refer prioritized clients on waitlist to open shelter beds.

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Section: Initial Intake

Step 1. Eligibility, Disclosure, Client Consent and Release of Information

When a client arrives, first screen for eligibility to receive Entry Point services

STOP: If the client is not eligible (see Section 1) refer to another resource.

If client is eligible:

- Disclose that you are a mandatory reporter and explain what that means
- Gain consent to enter client's data into HMIS, as outlined below.

HMIS consent

Everyone client should consent to having their data in the HMIS. Entry Point staff should make sure a client feels it is safe for their data to be entered into HMIS, especially if they disclose they are fleeing or have experienced domestic violence.

If the client arrives in-person, use the paper Release of Information (ROI) form to document their consent. The most up to date ROI form is on the HMIS Administrative website: ncceh.org/hmis/admin. Scan and attach a copy of the ROI to the client's electronic ROI if the client declines to consent to some or all sharing.

If the client calls Entry Point, use the privacy conversation to obtain verbal consent. Use Case Notes on the Client Profile tab to record any limits to the consent given.

Protecting Client Data in HMIS

Client data in HMIS is always protected with online encryption, closed system default settings, and individualized authorization. Local sharing between agencies is listed online on the Client Consent website: https://www.ncceh.org/hmis/clientconsent/. If a client has concerns about the privacy of their data in HMIS and wants to limit how their data is shared in the system, there are two choices to further protect client data:

- Client information can be de-identified in HMIS (aka an unnamed profile) or
- Searchability can be removed for that client.

Entry Point staff should use these options rarely, as they may make it more difficult to serve the client effectively. In general, creating a de-identified record or a record that isn't searchable should only be used if he client has specific safety concerns about their identified information being shared in HMIS or if they specifically request that their information not be shared in HMIS.

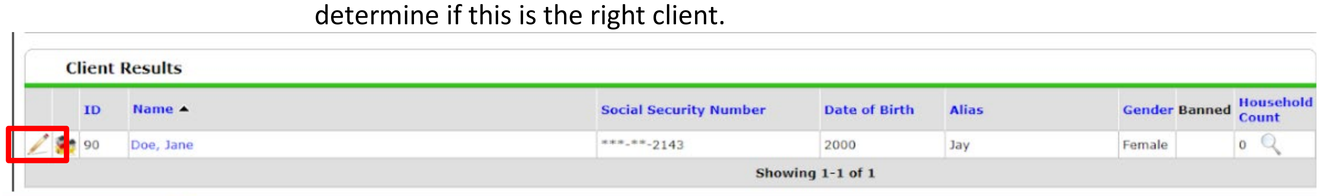
See the section on de-identified records and reducing searchability for step-by-step instructions.

Step 2. Create Client Profiles

HMIS Client Profile Search and Creation documents who is presenting for services.

1. Once logged into HMIS, confirm Enter Data As (EDA) for the correct Front Door project.
2. Go to *ClientPoint* to begin searching for the Head of Household.
3. Search three different ways to confirm if a client already has an HMIS profile.
    a. Three ways to search:
        i. One or two letters of the first name and full last name (Ja Doe).
        ii. Full first name and one or two letters of the last name (Jane Do).
        iii. Last four numbers of the SSN using the *Exact Match* box.

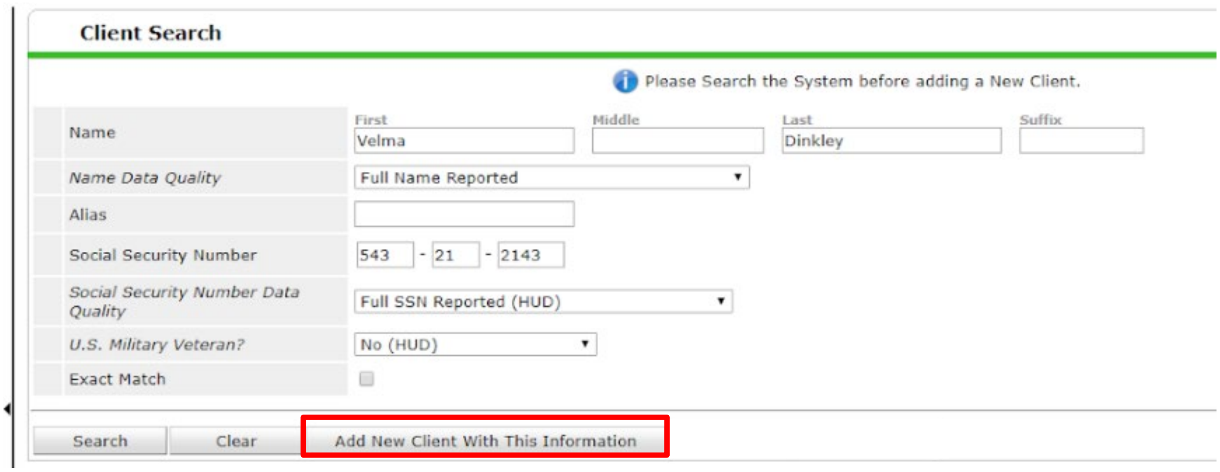
    b. If the client does have a profile, click on the name or pencil icon to navigate to their profile.
        i. Use the last four digits of the SSN, the Date of Birth, Alias, and Gender to determine if this is the right client.



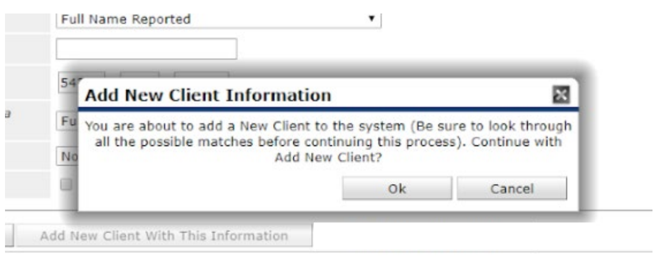
    c. If the client does not have a profile, you will need to complete as much of the *Client Search* fields as you can.
        i. These fields include:
            1. Full *Name* and *Name Data Quality* dropdown.

2. *Alias* if applicable or helpful to serve client.
3. Full *Social Security Number* and *SSN Data Quality* dropdown.
4. *U.S. Military Veteran?*

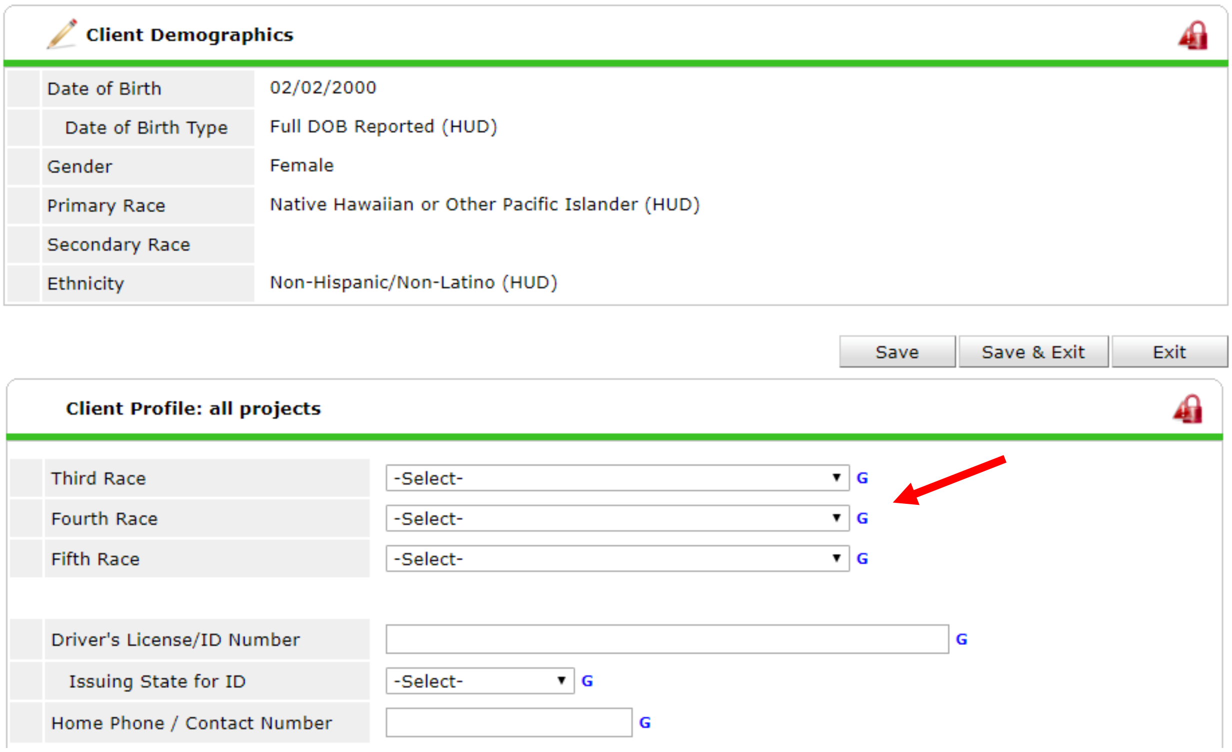
ii. Then click on *Add New Client with This Information.*



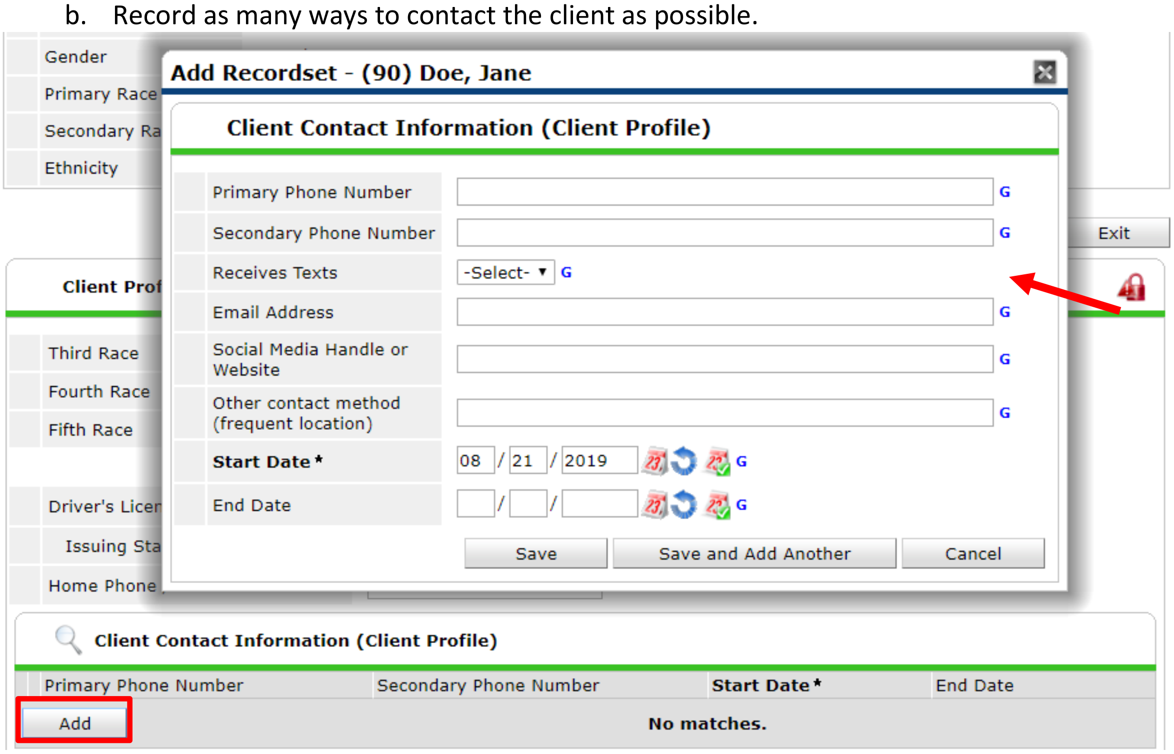
iii. A pop-up will appear to confirm that a new client profile should be created and that the *Client Search* area is complete.



4) Confirm or add all *Client Demographics* are complete.
   a) To add *Client Demographics*, use the pencil icon next to the section header.
   b) Remember that clients may identify up to five *Races* but only the *Primary* option is required.



5. Next, try to collect *Contact Information* for the *Head of Household*.
   a. If available, click the *Add* button in the *Client Contact Information* sub-assessment.
   b. Record as many ways to contact the client as possible.



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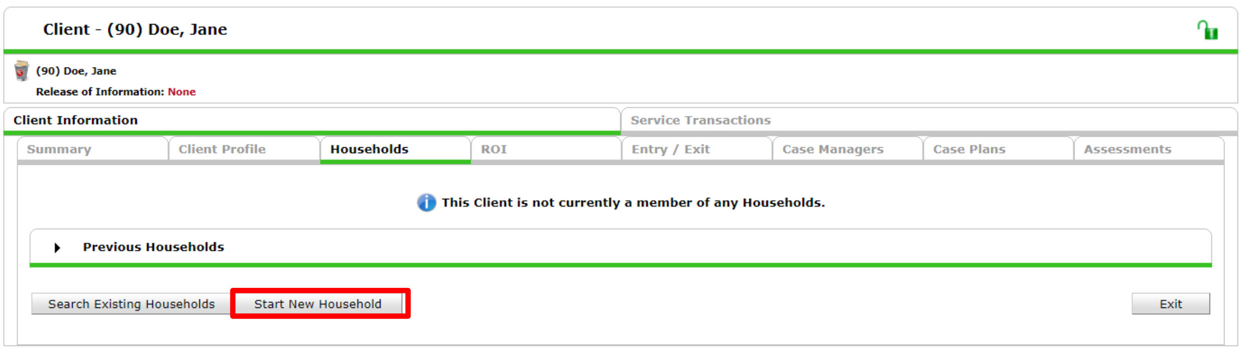
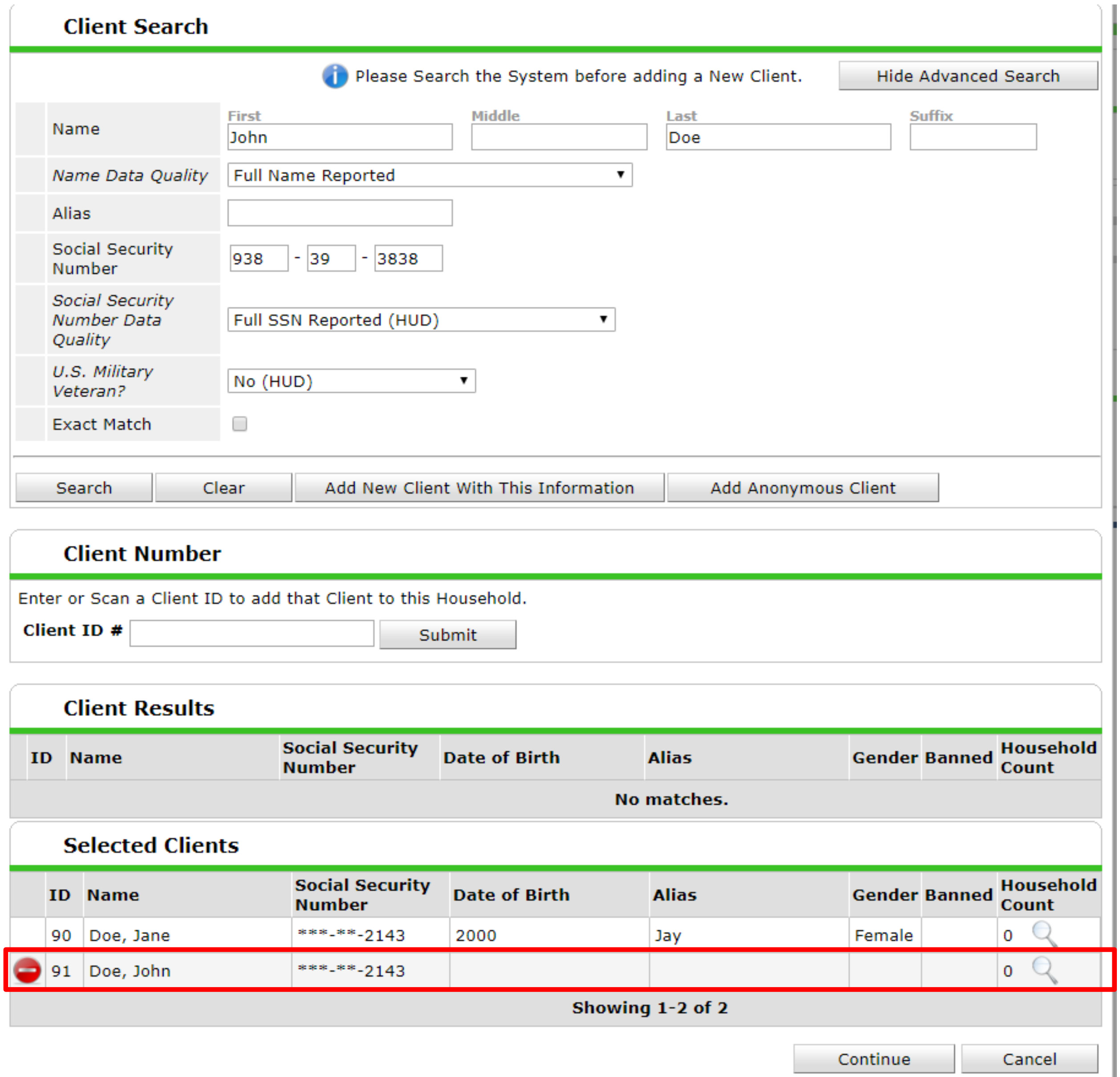
Step 3. Create Households

Create Households for multiple clients presenting together.

1. Begin on the *Head of Household*'s profile and go to the *Households* tab.
2. Determine if the *Household* tab is complete.
    a. If the client is presenting for services by themselves, skip the *Household* tab.
    b. If there is a *Household* already created, confirm the members are accurate.
        i. A new household can be created for a new group of clients.
        ii. Or a new client can be added to an already existing household.
        iii. Do not delete household members, you do not have to add them to entries or referrals.
3. To create a household, click on *Start New Household.*

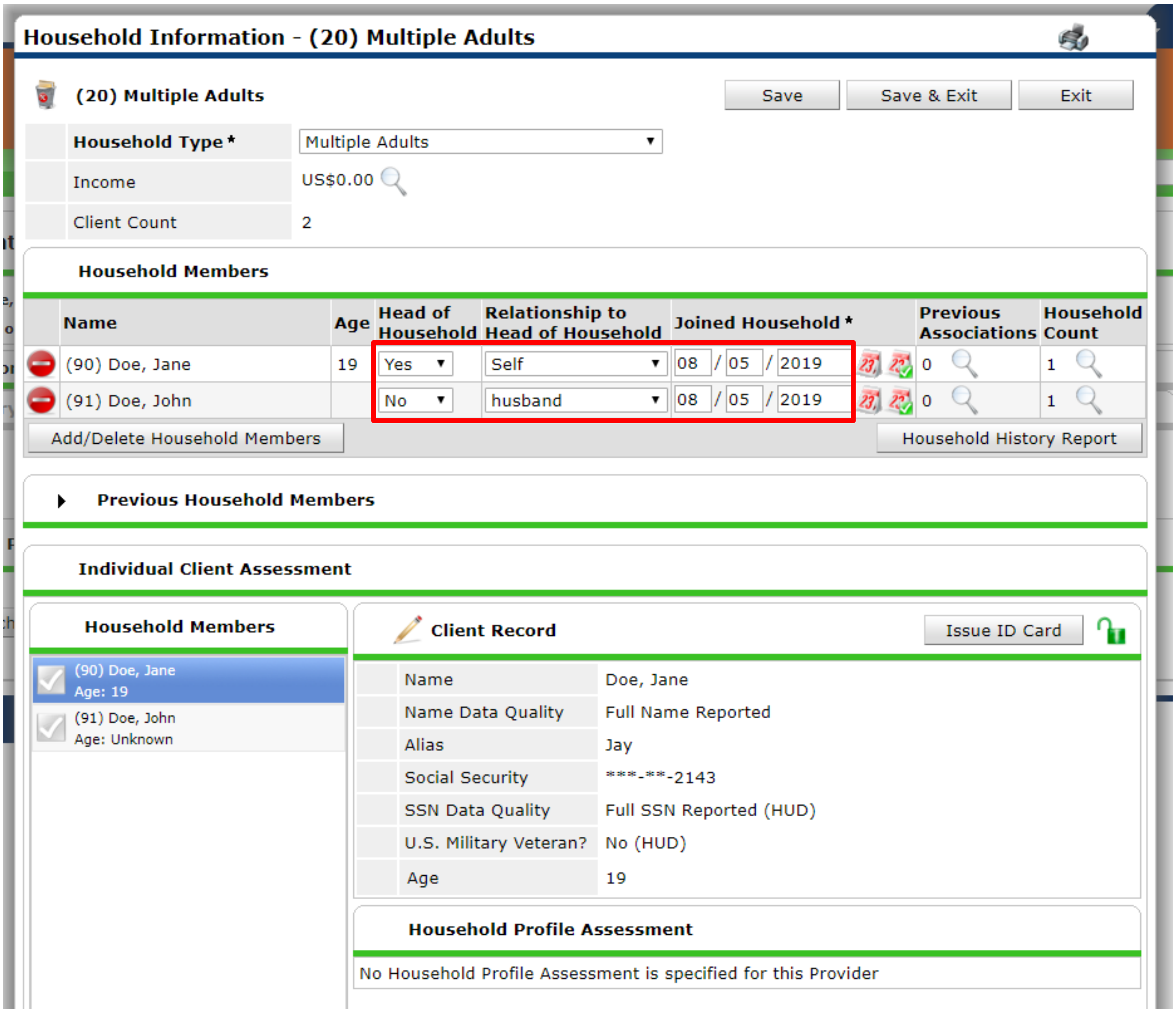


    a. Search for the next client using the same steps to search for profiles in the system as for the *Head of Household.*
        i. If an existing client profile matches, click the Green plus sign to add them to the *Selected Clients* section.
        ii. If a client profile is not found, complete all the fields in the *Client Search* section.
            1. Then, click on the *Add New Client with this Information* button.
    b. Click *Continue* after all household members have a profile in the *Selected Clients* section.



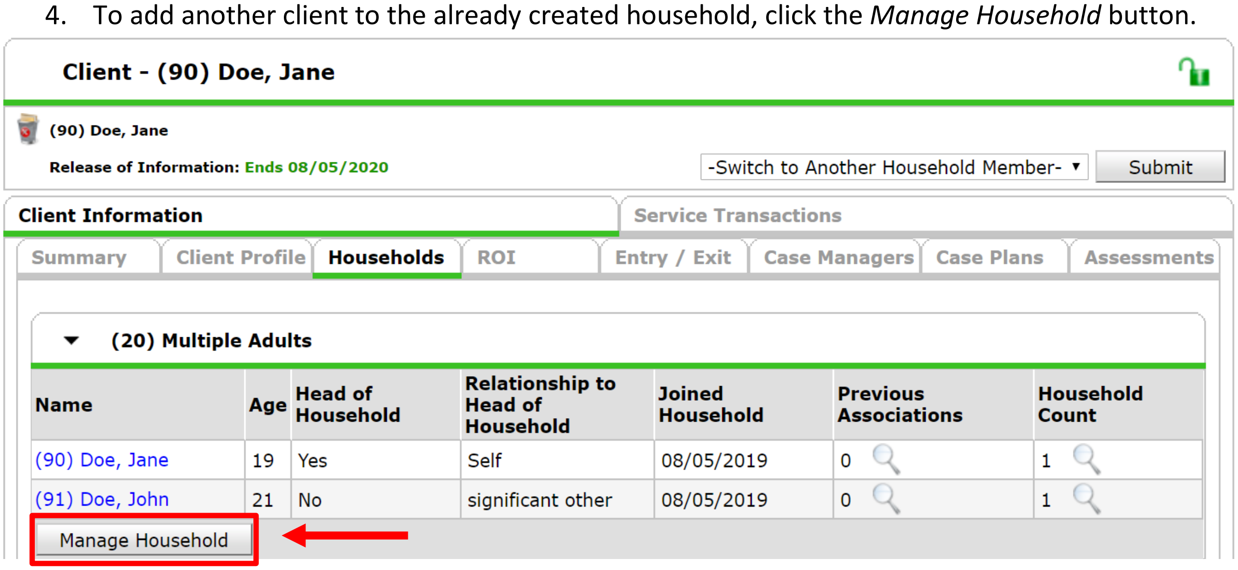
c. Complete the three household questions for each client.
   i. *Head of Household Yes* or *No.*
   ii. *Relationship to Head of Household* (heads of household list *Self*).
   iii. *Joined Household* is the date when these clients presented for services together in HMIS.
      1. Today or earlier.
      2. Not the date of first dates, marriages, or initial family events.

d. Click *Save & Exit* (at the top or bottom of page).

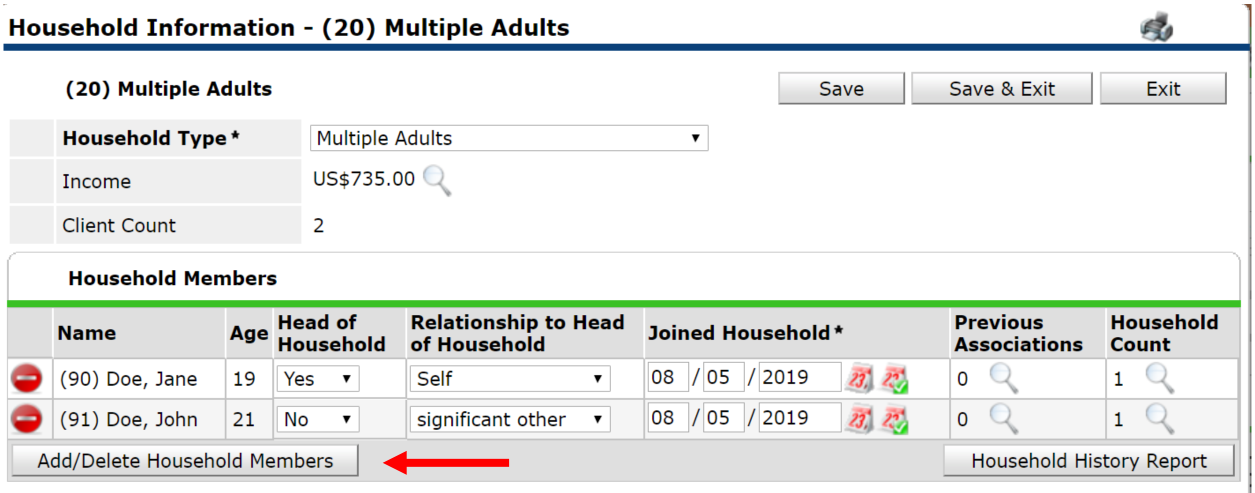


   e. A pop up may appear to remind you to confirm all parts are complete.

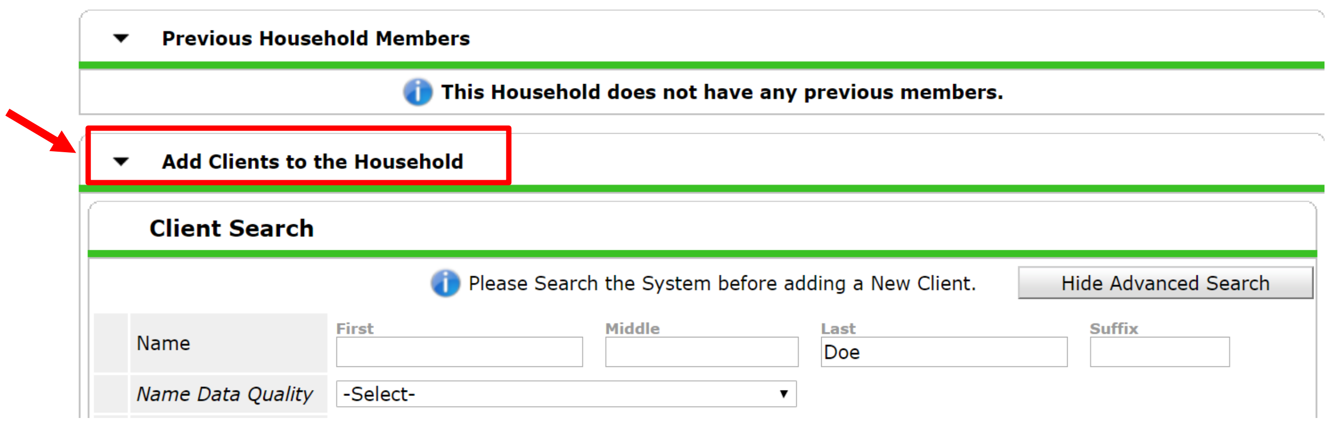
4. To add another client to the already created household, click the *Manage Household* button.



a. Click on *Add/Delete Household Members.*



b. Open the black arrow to *Add Clients to the Household.*
   i. Use the client search steps to find or create the household member's profile.
   ii. Repeat the search and add steps until all new household members are in the *Selected Clients* section.



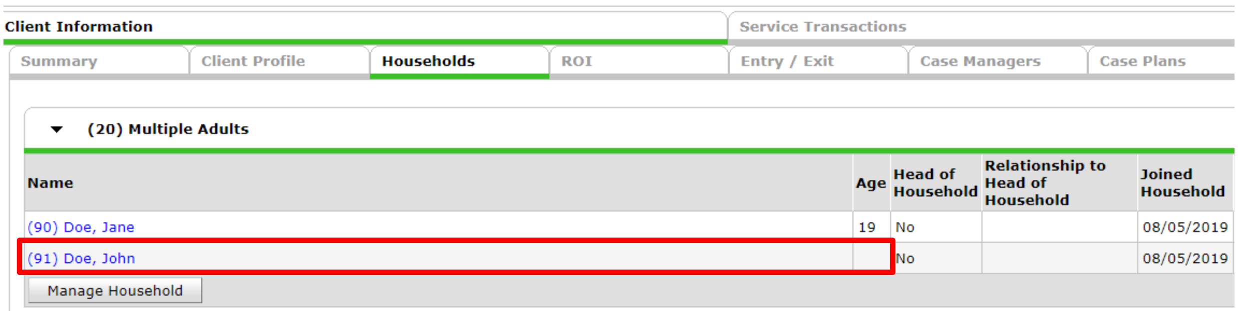
c. Click *Continue*.

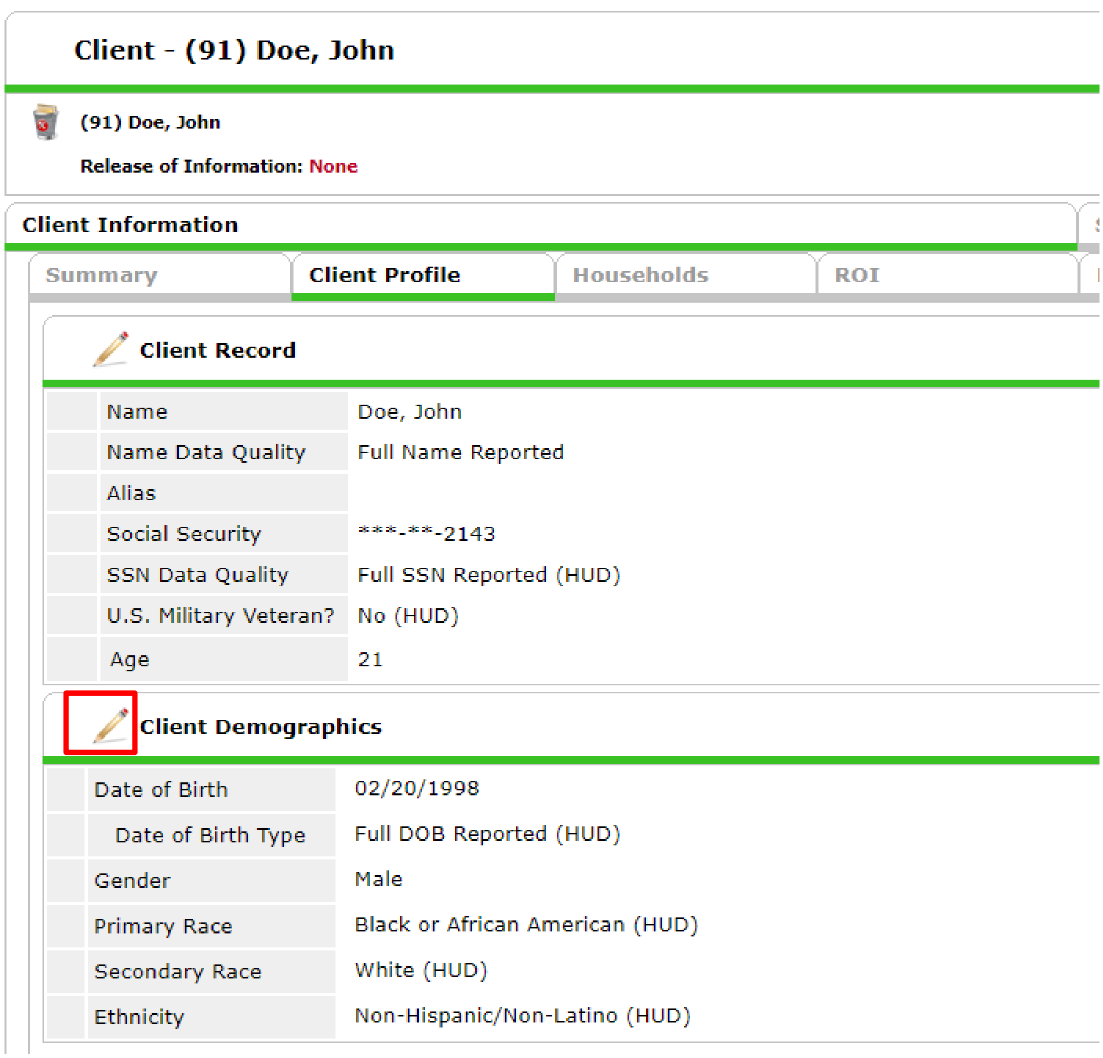
d. Complete the three household questions for each client.
   i. *Head of Household Yes* or *No.*
   ii. *Relationship to Head of Household* (heads of household list *Self*).
   iii. *Joined Household* is the date when these clients presented for services together in HMIS.
      1. Today or earlier.
      2. Not the date of first dates, marriages, or initial family events.

e. Click *Save & Exit.*

f. A pop up may appear to remind you to confirm all parts are complete.

5. Complete the *Client Demographics* for every household member.
    a. Click on each member's name in the household tab and then navigate to the *Client Profile.*
    b. Add *Client Contact Information* for adults if available.
    c. All clients in the active group on the *Household* tab should have an age to indicate completed *Client Demographics.*





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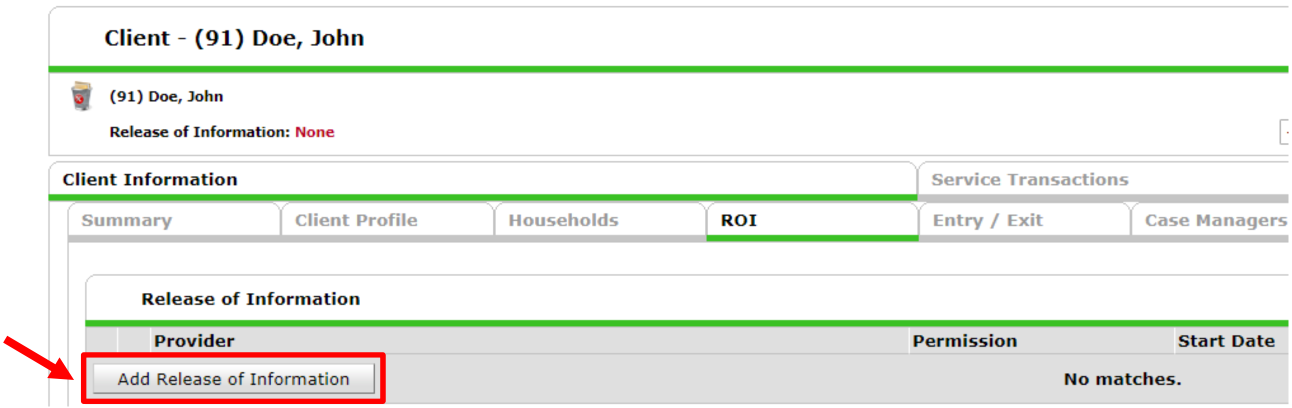
Step 4. Add electronic Release of Information (eROI)

HMIS needs a confirmation of the privacy and consent conversation with the client.

1. Click on the *ROI* tab.
2. Check if the client has an electronic *Release of Information* (eROI) covering the specific HMIS project you enter data for and today's date. If one already exists, continue to the *Entry/Exit* tab.
3. If one does not already exist, click on *Add Release of Information*.



4. Complete eROI information.
   a. Check all appropriate *Household Members*. The eROI confirms in HMIS what the client has given consent to for their data.
      i. Heads of Household and all other Adults must have separate signed ROI documents or respond separately for verbal consent.
      ii. The legal guardians will give sign or respond for their children or other dependents.
      iii. All household members must have an *eROI* recorded in HMIS.
   b. Confirm the *Provider* is the correct project. If it is not, cancel the eROI and change your *EDA* mode.
   c. Confirm *Release Granted or not:*
      i. If the client consents verbally on the phone or on a signed paper ROI document, select *Yes.*
      ii. If the client does not consent to portions of their data being shared, contact the Data Center as soon as you can after the conversion to help lock down those portions. Select *Yes or No* temporarily at your discretion.
      iii. If the client or household does not consent to any sharing, enter *No* to release granted.
   d. Select the dates that apply for the eROI.

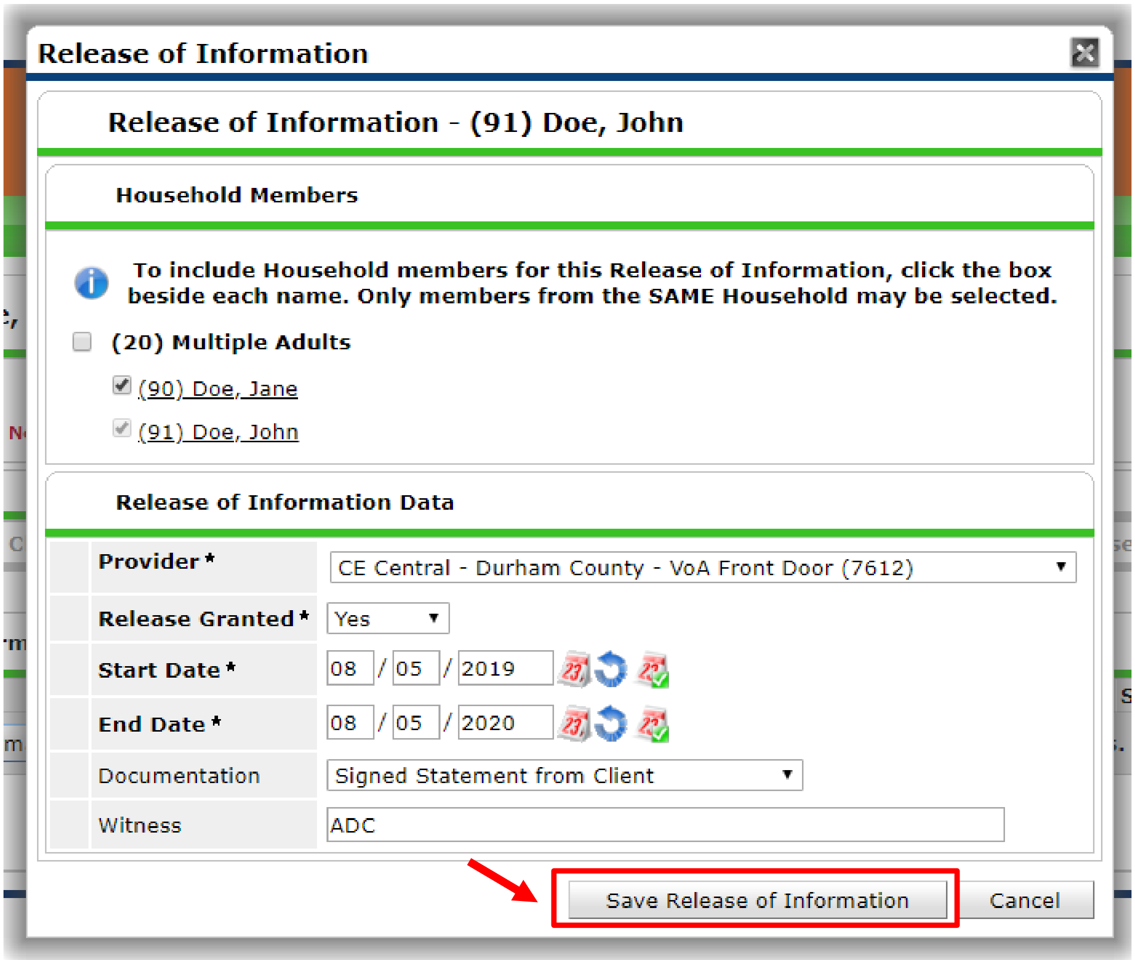
i. For clients on the phone giving verbal consent, the ROI lasts for 10 days.

ii. For clients in person signing the form, the ROI lasts for 1 year.

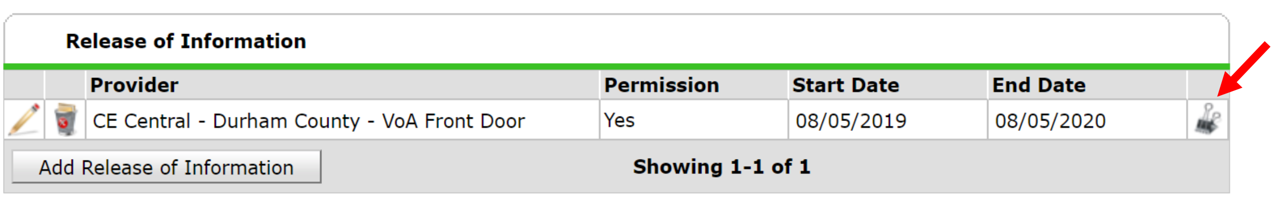
e. Record the type of *Documentation* from the dropdown.

f. For *Witness*, write in the initials of the staff who conducted the privacy conversation with the client/household.

g. Then click *Save Release of Information.*



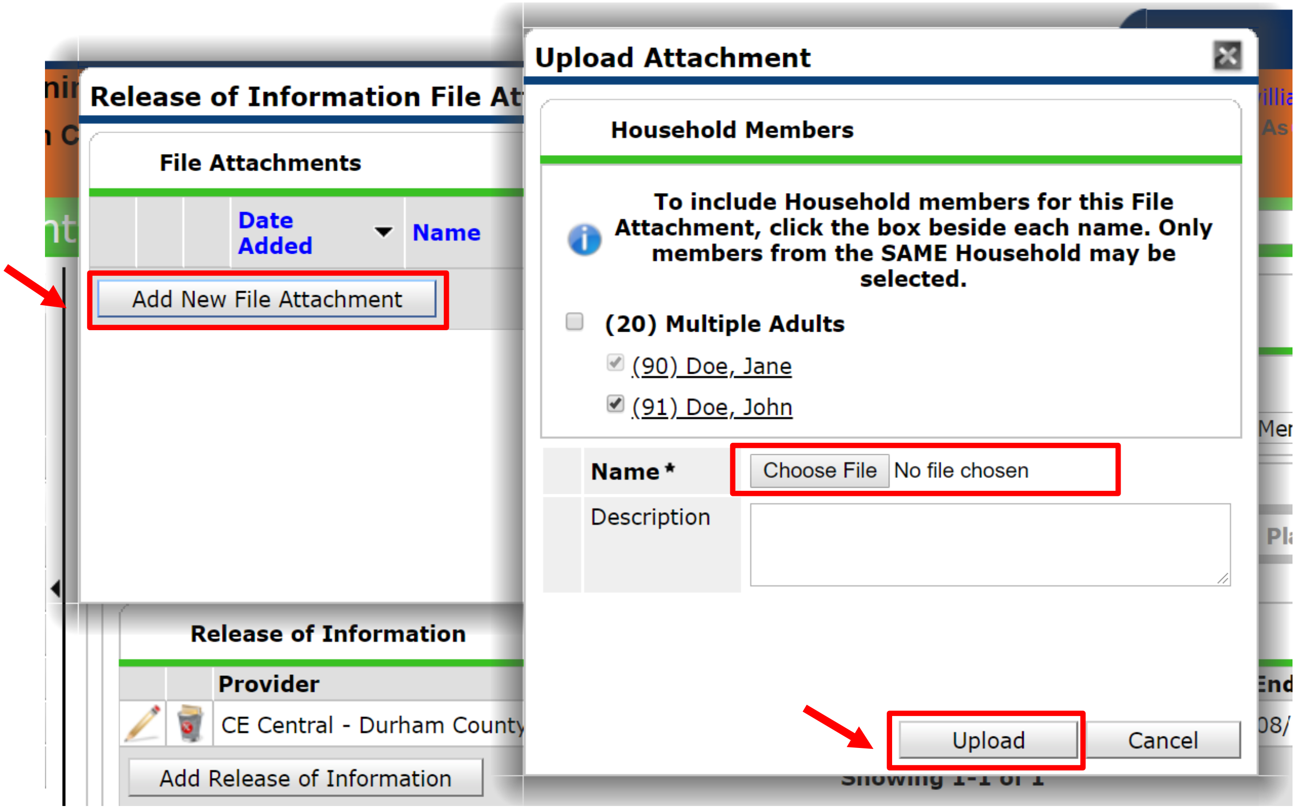
5. Click on the binder clip icon to the right of the new eROI to attach a scanned paper copy of the documentation.



i. Select *Add New Attachment.*

ii. Upload the file (any file type) with ROI in the name.

iii. Add a description at your discretion.



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Section: Diversion Conversation

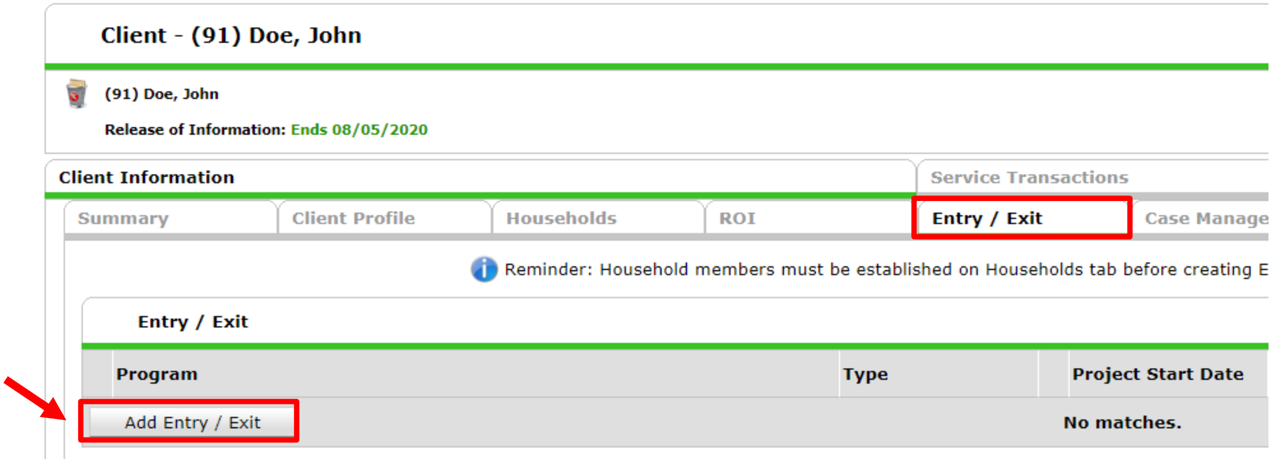
Every client must receive a creative problem-solving conversation to help them identify alternatives to homelessness. An HMIS Project Start Assessment will be used to record some of the information collected during that conversation.

Record the Diversion Conversation via HMIS Project Entry

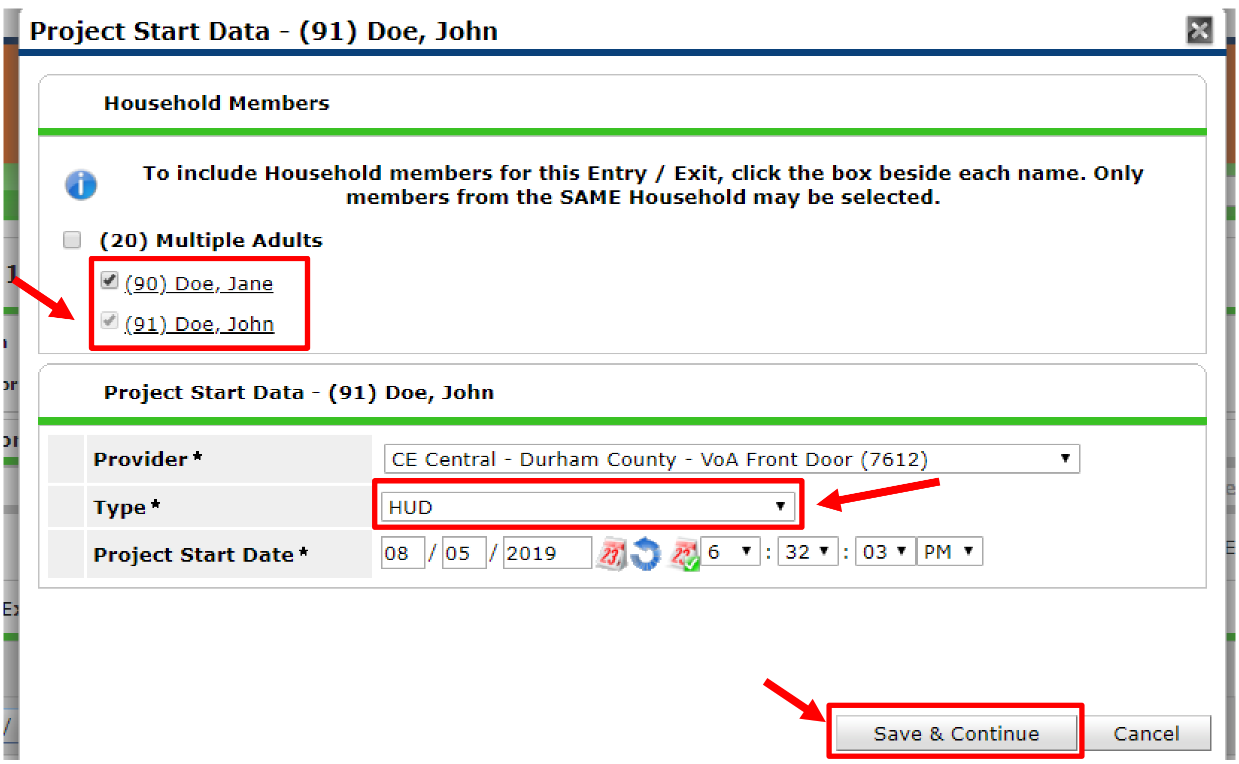
Add an Entry

Add a *Project Start* on the *Entry/Exit* tab to show the client is seeking emergency shelter.

1. On *Entry/Exit* tab, click *Add new Entry/Exit*.

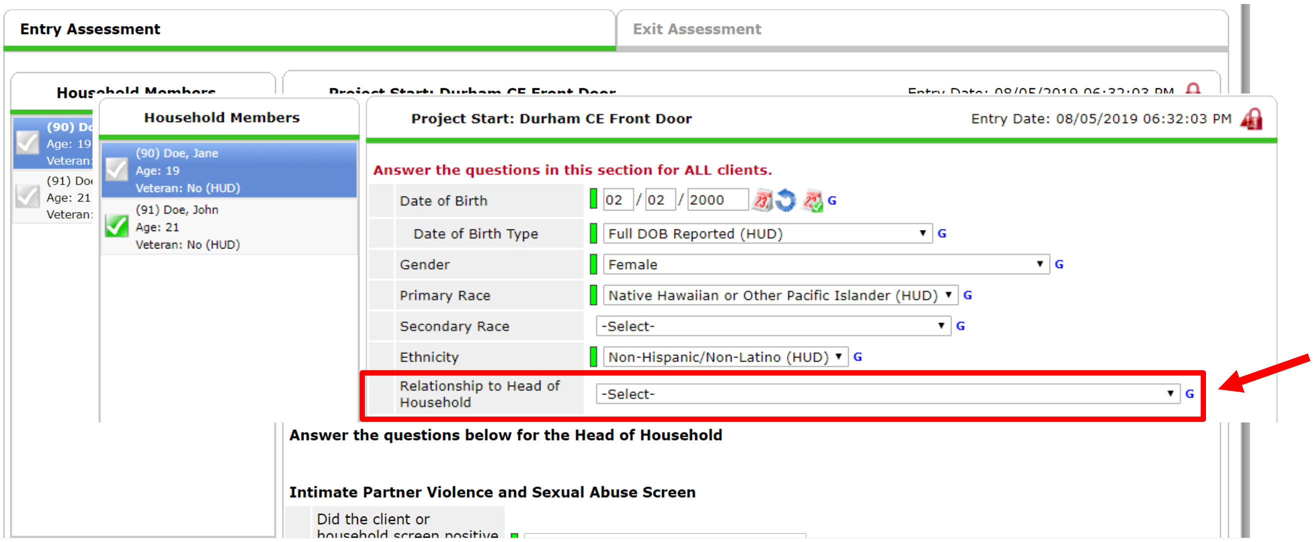


2. Complete the *Project Start Data*.
    a. Check all *Household Members* who present for services together.
    b. Confirm the *Provider* is accurate. If it is not, cancel the *Project Start* and change your *EDA* mode.
    c. Select *HUD* as the entry *Type.*
    d. The *Project Start Date* will appear as today's date and time.
    e. Click *Save & Continue.*



3. Confirm the top table with the client demographic information to the *Project Start: Durham CE Front Door* Assessment.

   a. **ALL** household members are required to have questions through *Relationship to Head of Household* completed.
   b. A Head of Household should have the *Relationship* set to *Self*

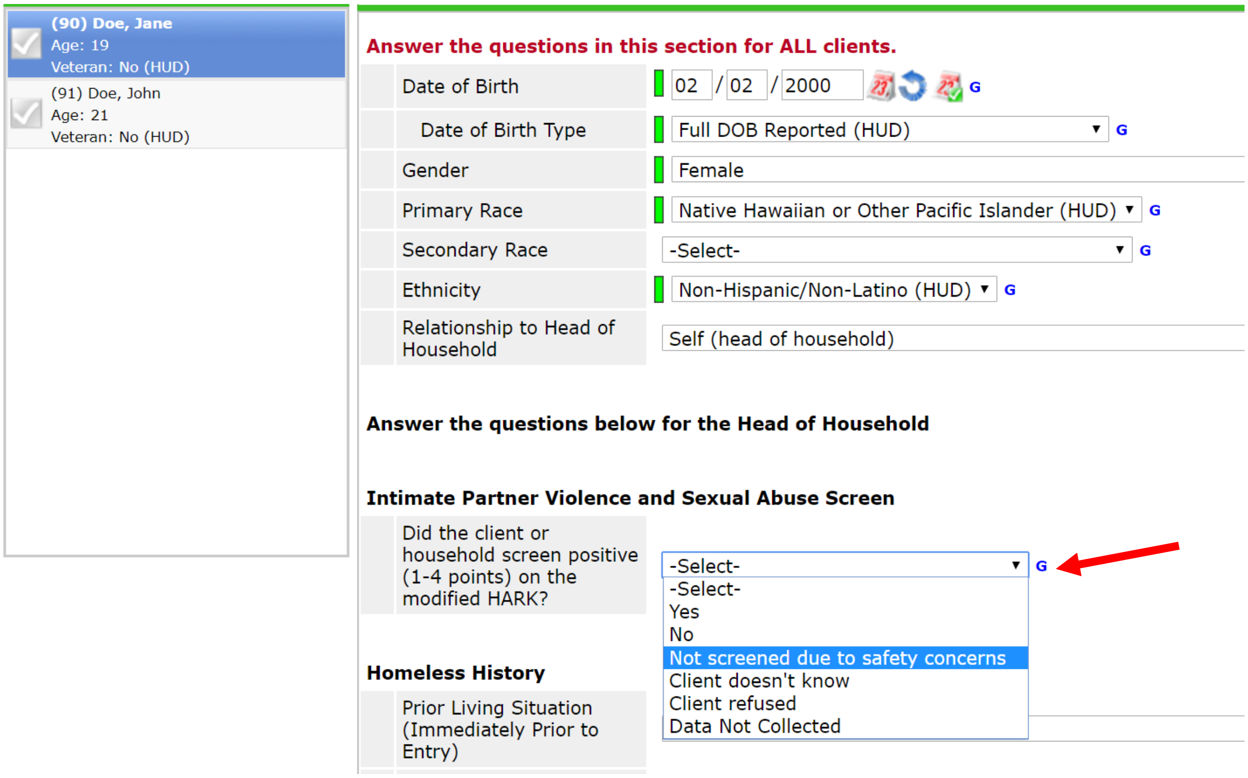


4. Head of households will have the results for the diversion conversation recorded on their Project Start Assessment. Other clients are not required to have the full conversation recorded.

Conduct and Record Result of the HARK

Before you begin the full diversion conversation, record the result for Heads of Household on the *Intimate Partner Violence and Sexual Abuse Screen*.

1. Select the appropriate result for the modified HARK
   a. Use a *Yes* result for a score of 1-4.
   b. Use a *No* result for a score of 0.
   c. Use a *Not screened due to safety concerns* if it was not safe for either you or the clients to conduct the full screen.
   d. Use *Client Doesn't Know* or *Client Refused* if the client cannot provide a response
   e. Use *Data Not Collected* if the screen was never completed and safety was not a concern (rarely if ever used).

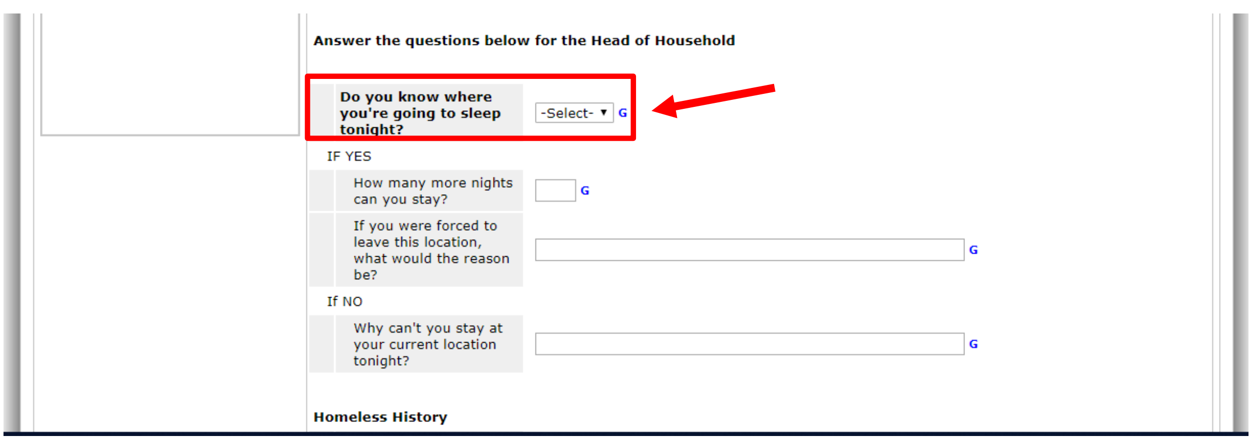


2. This result is for the Head of Household, not necessarily the other adult Household members

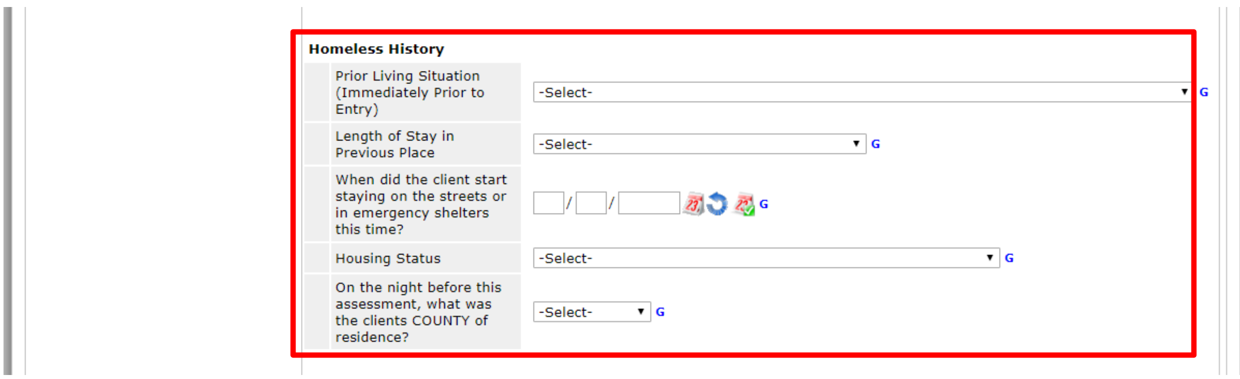
3. You may need to offer a referral to the local Victims Services Provider. Check the Section: HARK and Safety Planning for further instructions.

Record the Results of the Diversion conversation

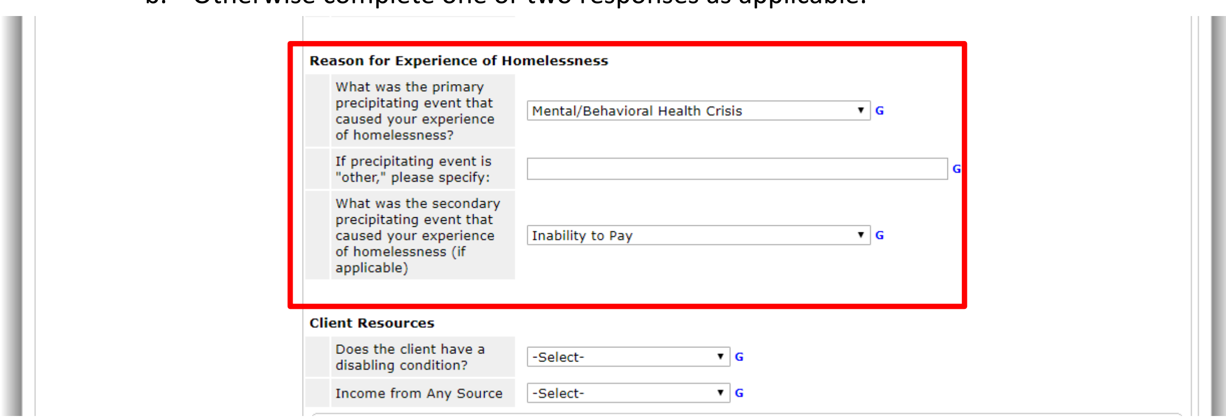
1. Record the client's response to, *Is there a home, apartment, or other housed situation where you can stay tonight?* The result should prompt the appropriate response below in the next questions.
    a. If *Yes* is selected, answer the number of nights and reason questions.
    b. If *No* is selected, answer the question about why they cannot stay.



2. Record the *Homeless History* of the client
    a. *Prior Living Situation* refers to what type of housing the client had ***last night***.
        i. Never use *Safe Haven* or *Interim Housing.*
        ii. If a client stayed at the Durham Rescue Mission last night, use *Residential project or hallway house with no homeless criteria*.
    b. *Length of stay* refers to how long the client had stayed at ***last night's location***.
    c. The start staying date question refers to continuous stays on either the streets or in emergency shelters.
        i. If the client was precariously housed last night, but has nowhere to go tonight, the date would be today.
        ii. If the client was precariously housed last night, and can stay there for one or more nights, the date is left blank.
    d. *Housing Status* asks for the Homeless Category under HUD's definition (see Eligibility for Entry Point Services).
    e. The *County of residence* is this section's last question.



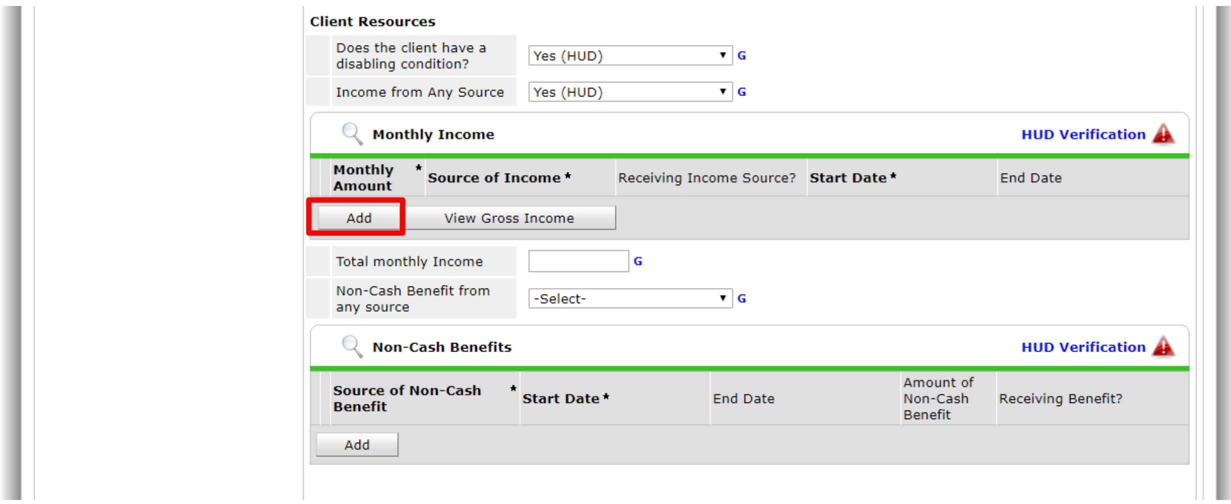
5. The next section is the *Reason for Experience of Homelessness.*
    a. If the client is not included in one of HUD's Categories of Homelessness, leave blank.
    b. Otherwise complete one or two responses as applicable.



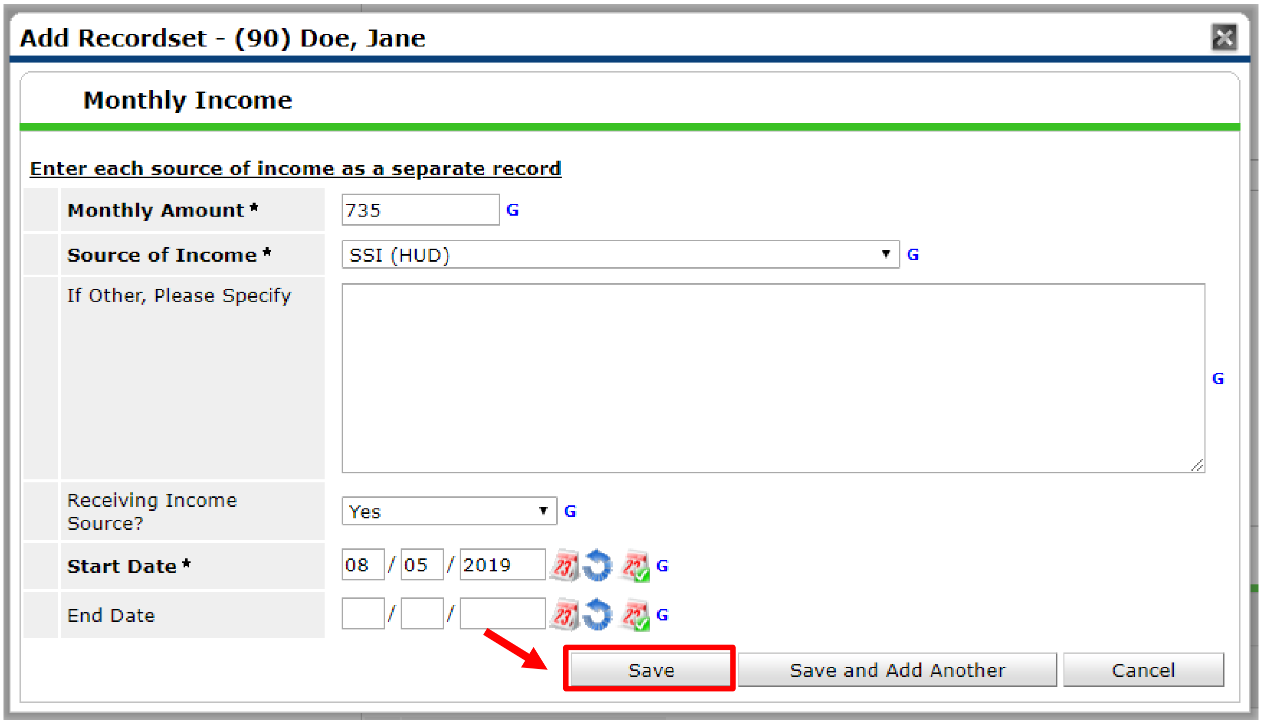
6. Under the *Client Resources* section, complete information about disabling condition, income, and non-cash benefits.

a. *Disabling condition* (Yes/No) refers to the HUD definition.
   i. A physical, mental, or emotional impairment, including an impairment caused by alcohol or drug abuse, post-traumatic stress disorder, or brain injury that:
      1. Is expected to be long-continuing or of indefinite duration;
      2. Substantially impedes the individual's ability to live independently; and
      3. Could be improved by the provision of more suitable housing conditions.
   ii. A developmental disability.
   iii. HIV or AIDS.

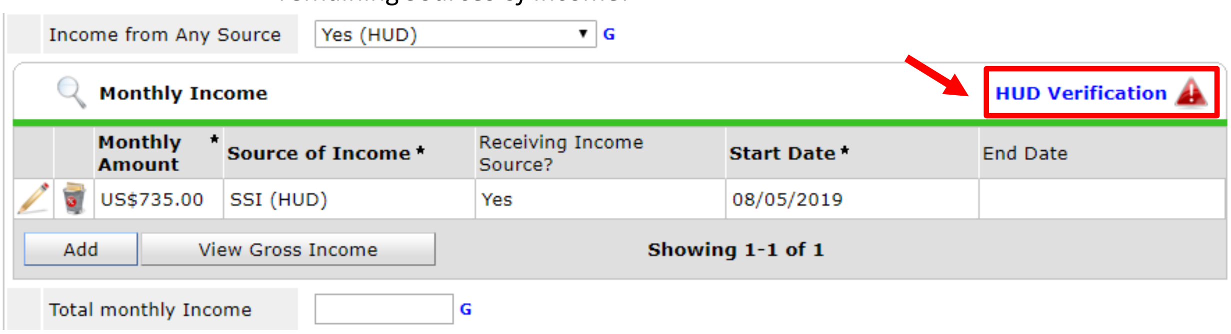
b. *Income* refers to this client's on-going monthly income and documentation is not needed. Indicate the client's response to every option by following the steps below.
   i. Select the Yes/No response for the general gateway question, *Income from Any Source.*



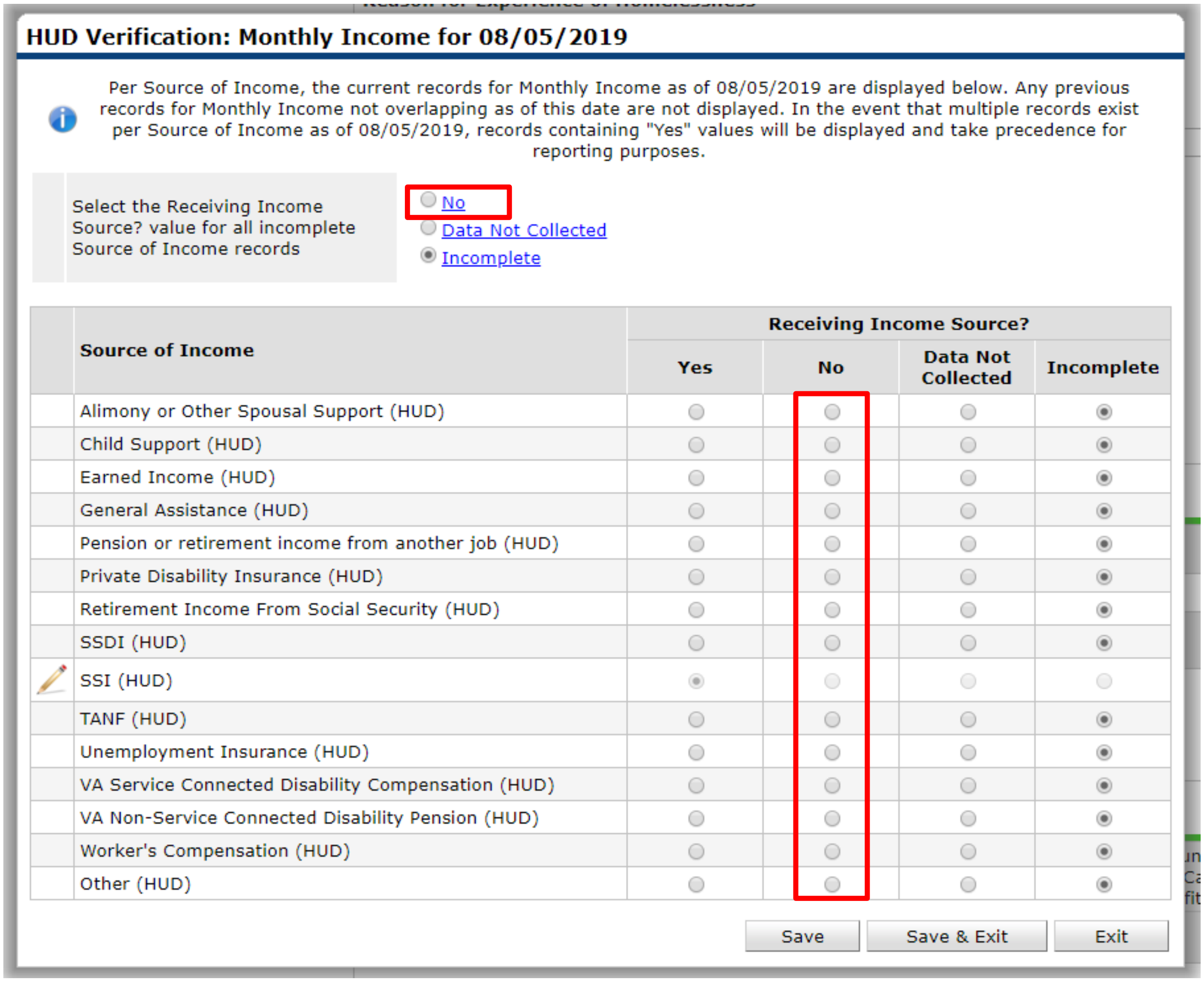
   ii. If they do have income, add the applicable source of income and complete the detailed questions by clicking *Add*.
      1. Complete the *Monthly Amount.*
      2. Select *Source of Income.*
      3. Select *Yes* for *Receiving Income Source.*
      4. *Start Date* refers to the first date this information was known (today!).
      5. *Click Save.*
      6. Repeat as necessary for each source of client's income.



iii. Select the *HUD Verification* button to complete the no responses for the remaining *Sources of Income*.



1. Click *No* for each *Source of Income* in the list or click *No* near the top for all incomplete *Source of Income* records.
2. Click *Save & Exit*.
3. HUD Verification should have a green check mark next to it when complete



HUD Verification: Monthly Income for 08/05/2019

Per Source of Income, the current records for Monthly Income as of 08/05/2019 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 08/05/2019, records containing "Yes" values will be displayed and take precedence for reporting purposes.

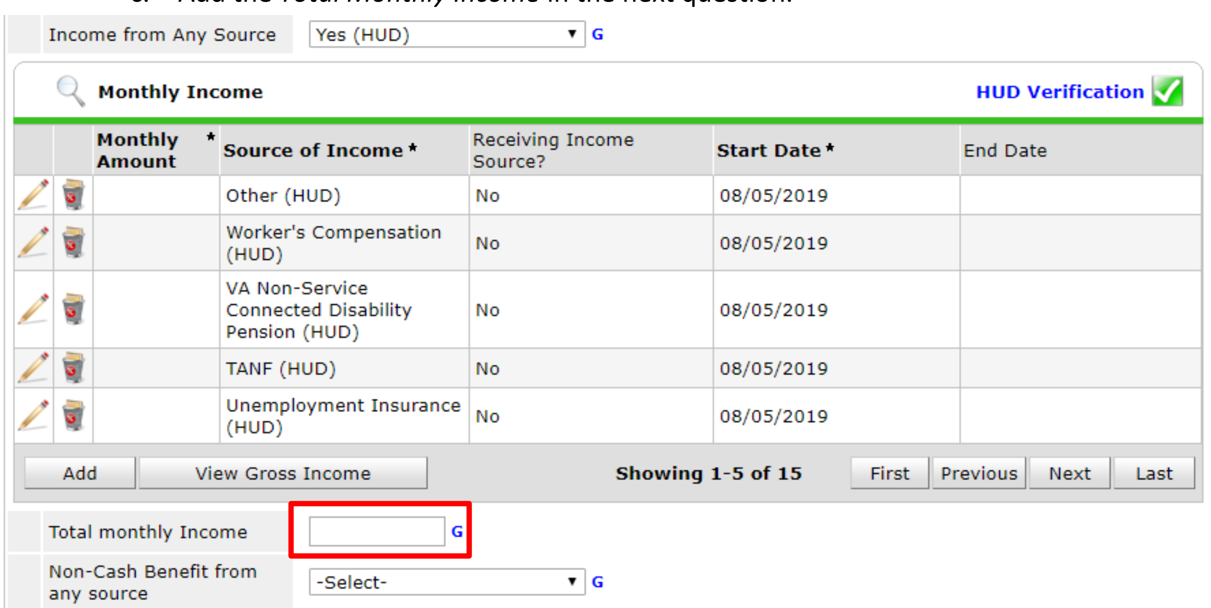
Select the Receiving Income Source? value for all incomplete Source of Income records

- No
- Data Not Collected
- Incomplete

Source of Income	Receiving Income Source? Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)				
Child Support (HUD)				
Earned Income (HUD)				
General Assistance (HUD)				
Pension or retirement income from another job (HUD)				
Private Disability Insurance (HUD)				
Retirement Income From Social Security (HUD)				
SSDI (HUD)				
SSI (HUD)				
TANF (HUD)				
Unemployment Insurance (HUD)				
VA Service Connected Disability Compensation (HUD)				
VA Non-Service Connected Disability Pension (HUD)				
Worker's Compensation (HUD)				
Other (HUD)				

Save | Save & Exit | Exit

c. Add the *Total Monthly Income* in the next question.



Income from Any Source: Yes (HUD) G

Monthly Income — HUD Verification

Monthly Amount *	Source of Income *	Receiving Income Source?	Start Date *	End Date
	Other (HUD)	No	08/05/2019	
	Worker's Compensation (HUD)	No	08/05/2019	
	VA Non-Service Connected Disability Pension (HUD)	No	08/05/2019	
	TANF (HUD)	No	08/05/2019	
	Unemployment Insurance (HUD)	No	08/05/2019	

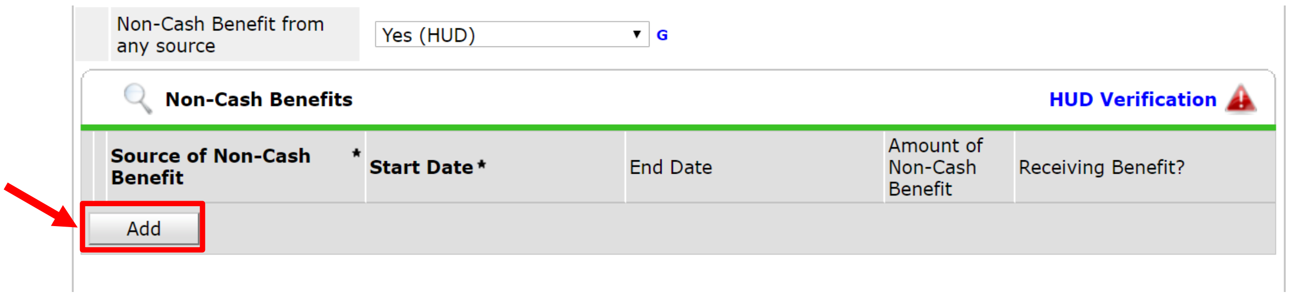
Add | View Gross Income | **Showing 1-5 of 15** | First | Previous | Next | Last

Total monthly Income: G

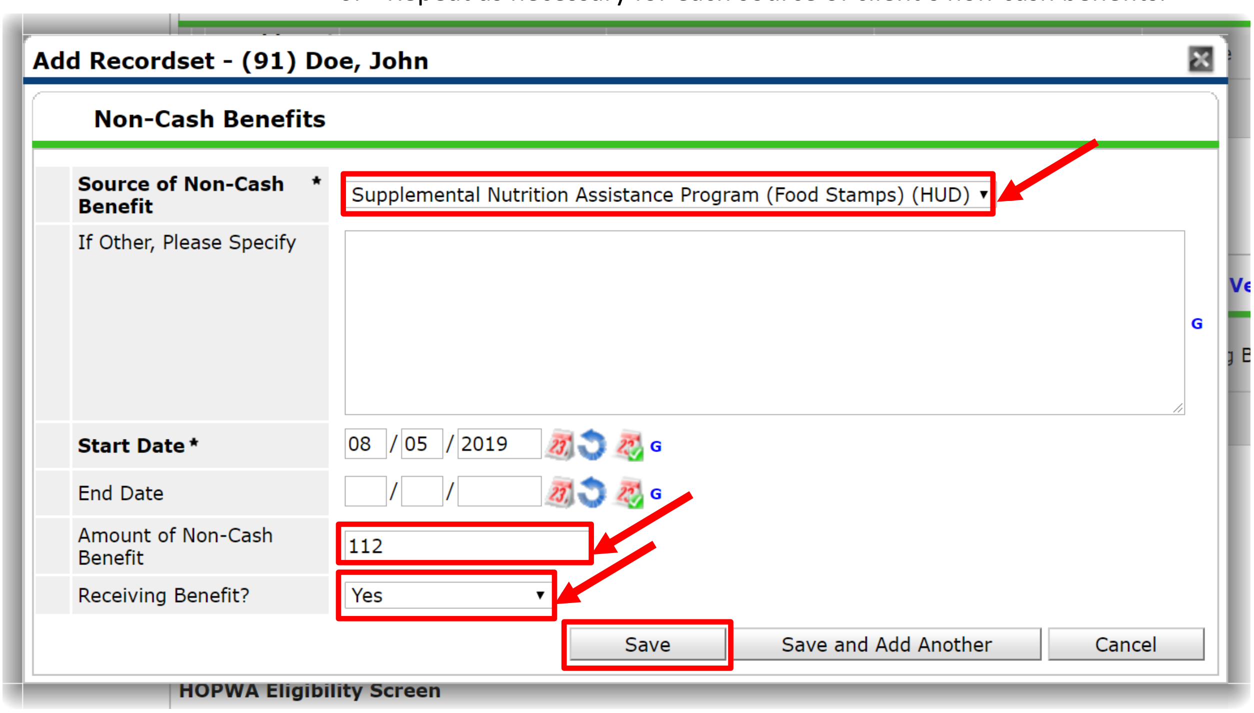
Non-Cash Benefit from any source: -Select- G *d.* *Non-Cash Benefits* refers to on-going monthly benefits and documentation is not needed. Indicate the client's response to every option by following the steps below.

i. Select the Yes/No response for the general gateway question, *Non-Cash Benefit from Any Source.*

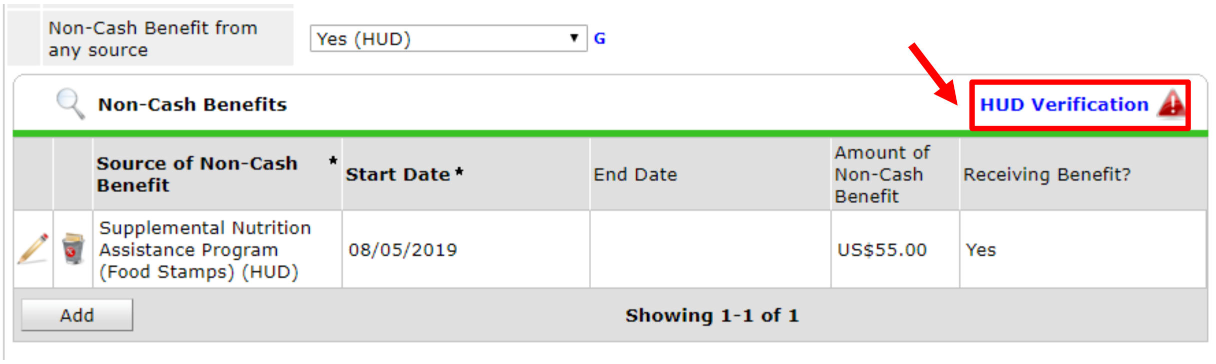
ii. If the client receives non-cash benefits, add the applicable source of benefits and complete the detailed questions by clicking *Add*.



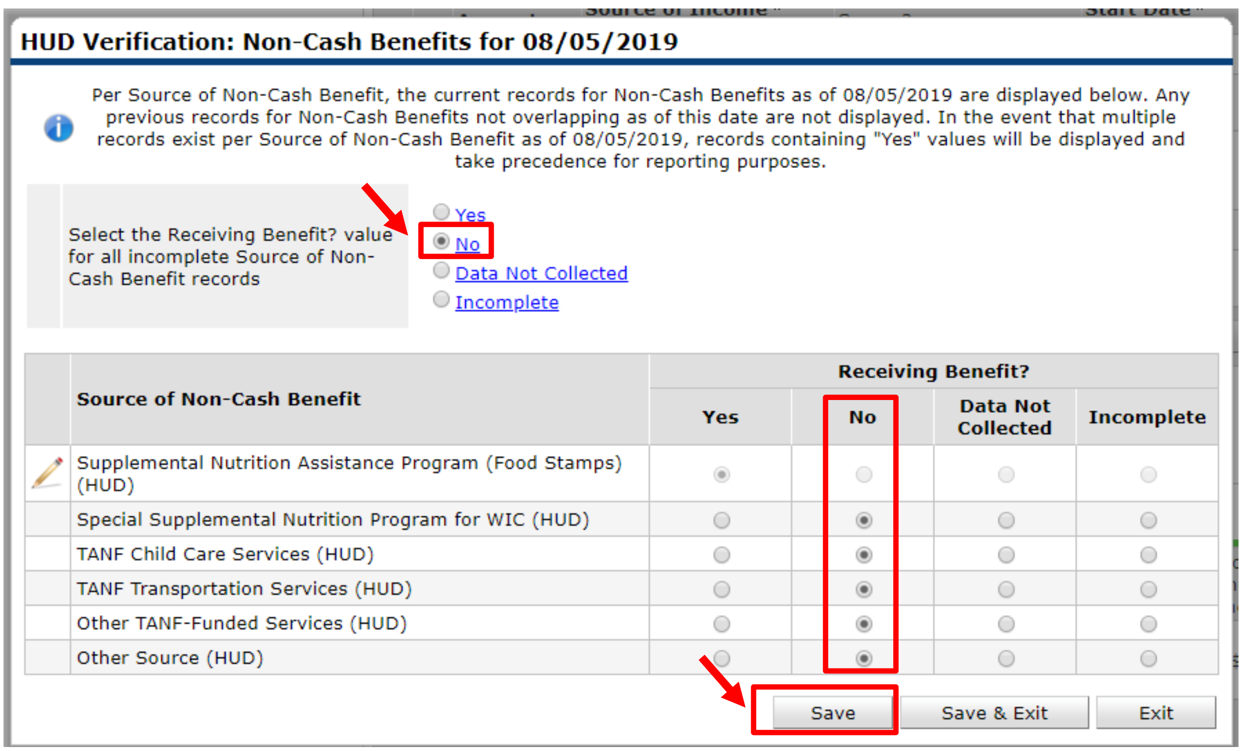
1. Select the *Source of Non-Cash Benefit.*
2. *Start date* refers to the first date this information was known (today!).
3. Complete *Amount of Non-Cash Benefit*.
4. Select *Yes* for *Receiving Benefit?*.
5. Click *Save.*
6. Repeat as necessary for each source of client's non-cash benefits.



iii. Select the *HUD Verification* button to complete the no responses for the remaining sources of *Non-Cash Benefits*.



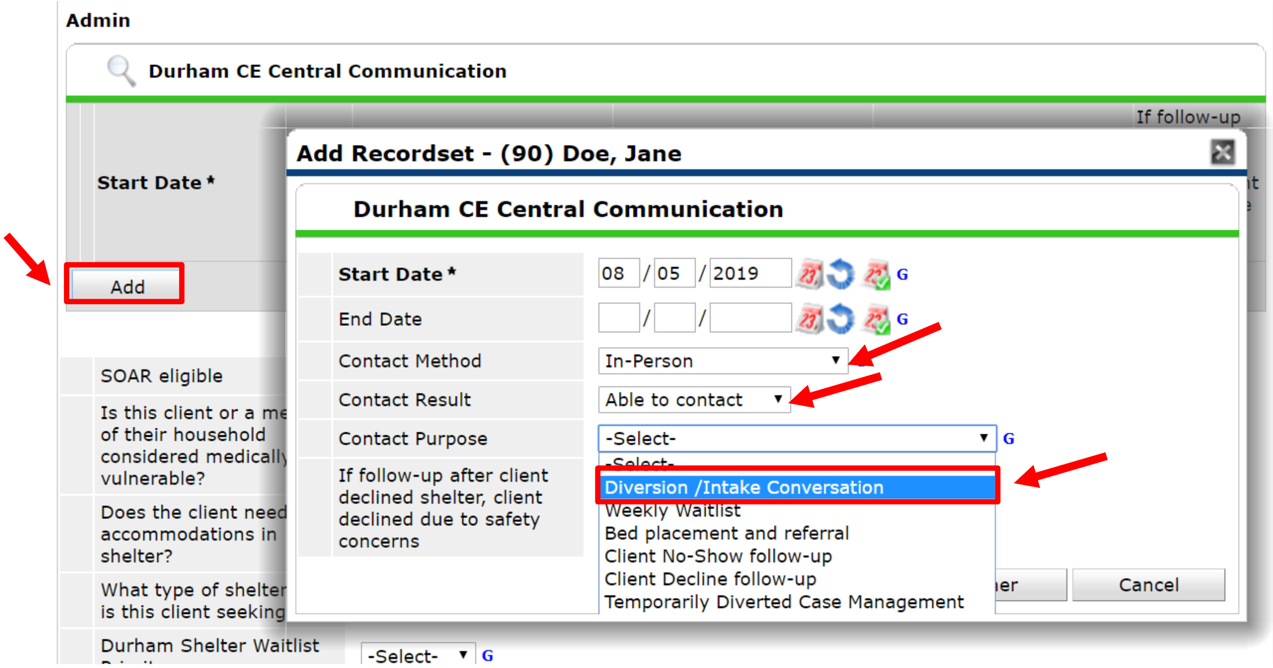
1. Click *No* for each *Source of Non-Cash Benefit* in the list or click *No* near the top for all incomplete *Source of Non-Cash Benefit* records.
2. Click *Save & Exit*.
3. HUD Verification should have a green check mark next to it when complete



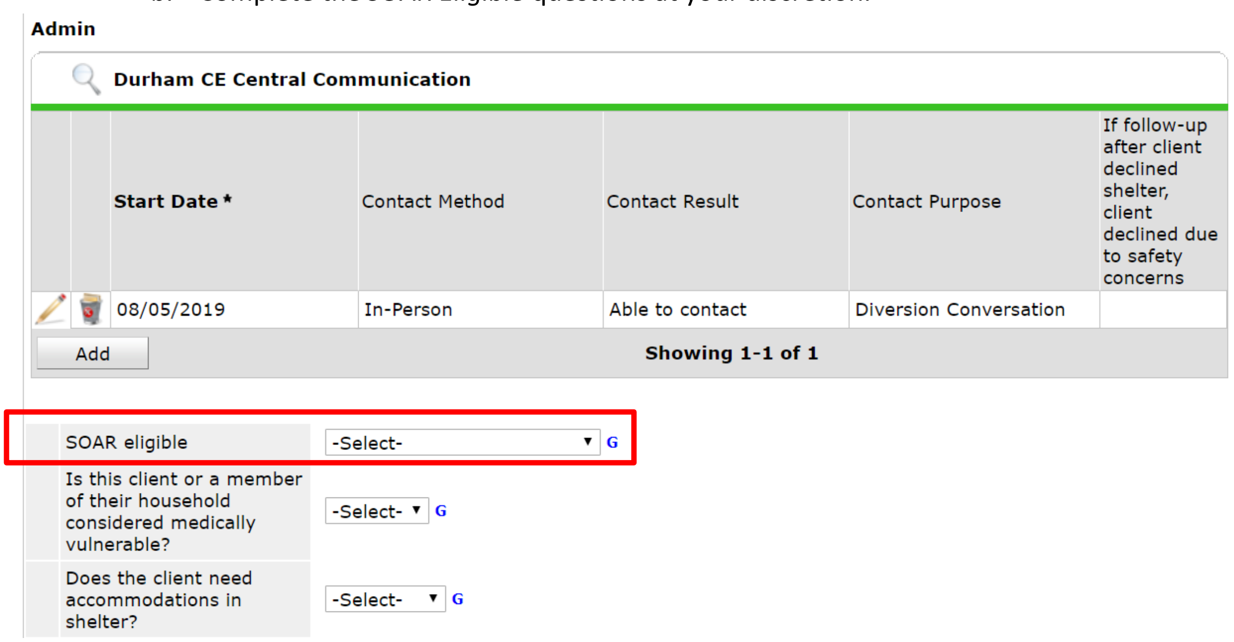
7. All *Heads of Household* must have the *Admin* section completed.
    a. Click *Add* in the *Durham Entry Point Communication* sub-assessment to create a contact for the Diversion Conversation.
        i. The *Start Date* will be today's date.
        ii. *End Date* is optional.
        iii. Add the *Contact Method* as *In-Person* or *Phone*.
        iv. Add the *Result* as *Able to contact*.
        v. Add the *Diversion Conversation* as *Contact Purpose.*

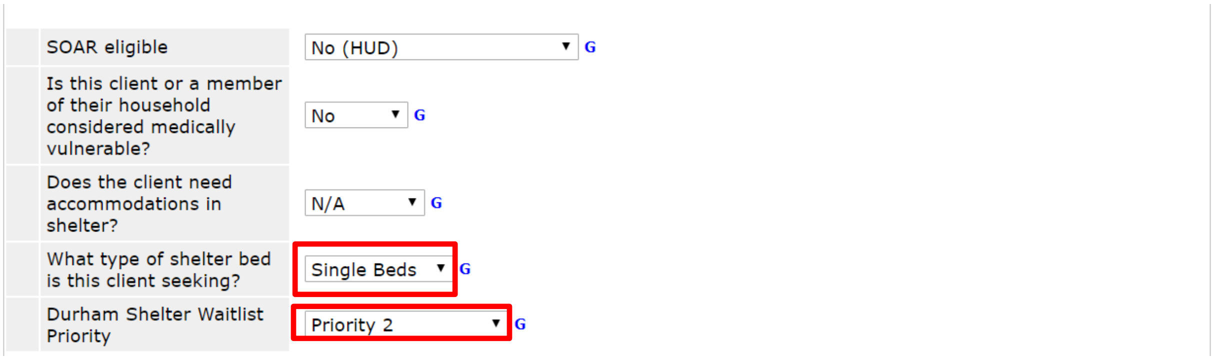
vi. Skip *If follow-up after client declined shelter.*

vii. Click *Save.*

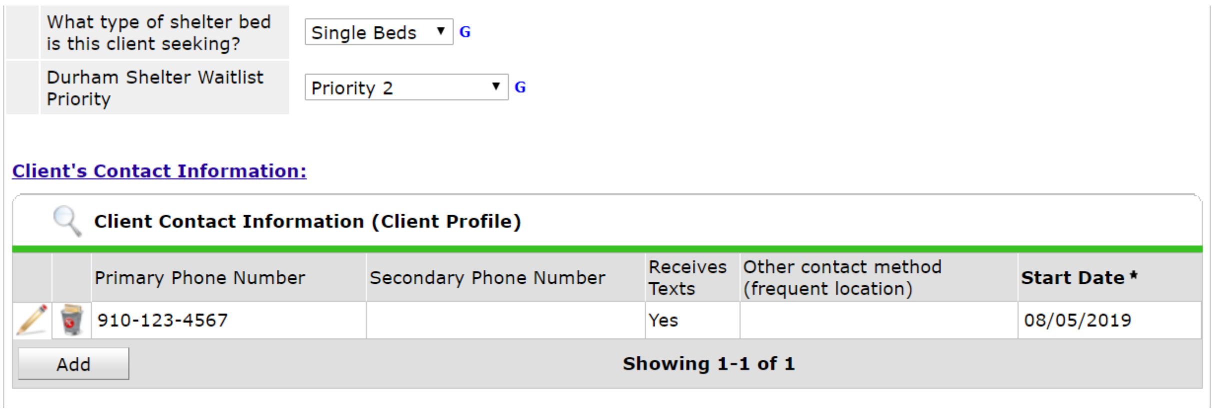


b. Complete the *SOAR Eligible* questions at your discretion.





c. Update (with the pencil) or *Add* any additional ways to contact the client if needed.



8. *Save & Exit* the Project Start Assessment.

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Diversion Resources

Many clients will not need financial assistance to successfully avoid homelessness. For those who do need assistance, first screen for DSS program eligibility, then for other available community resource eligibility, and use VOA's City-funded diversion assistance last.

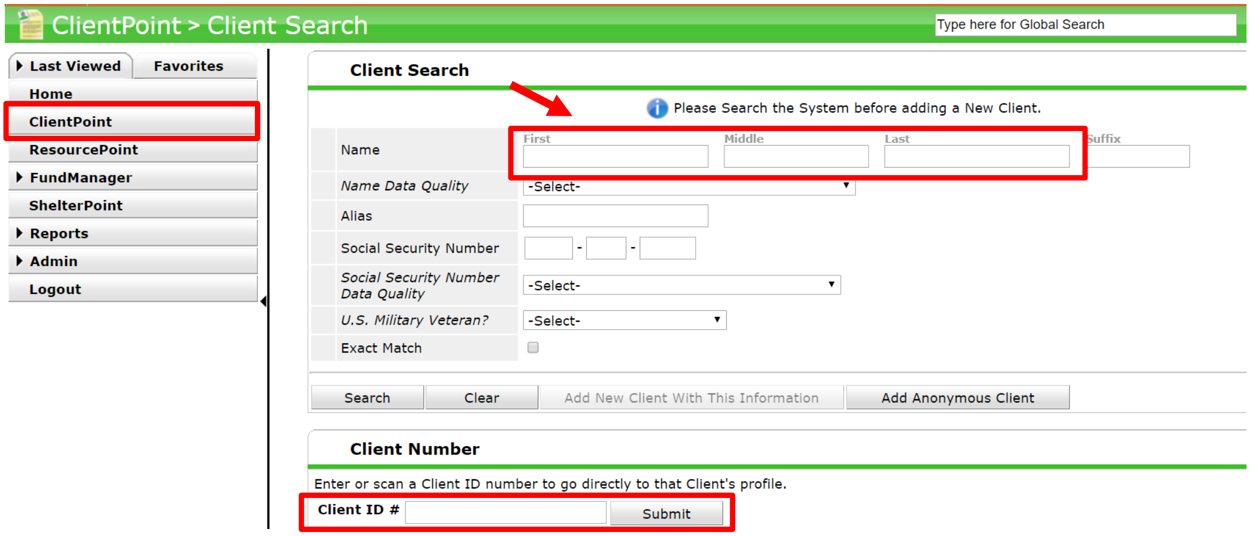
City-Funded Diversion Assistance

If using City-Funded Diversion Assistance, complete service transaction with fund manager to document diversion funds used.

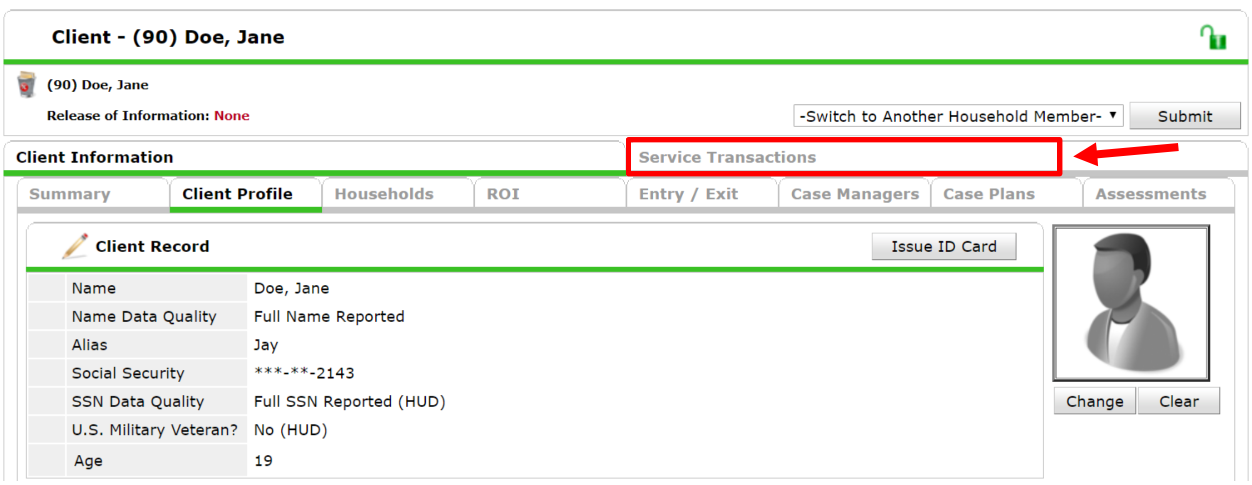
1. Confirm EDA for the correct Front Door project.
2. Confirm the correct date is selected.
    a. If the financial assistance was paid today, you don't need to change the date.

b. If the financial assistance was not paid today, change Backdate mode to the correct date.

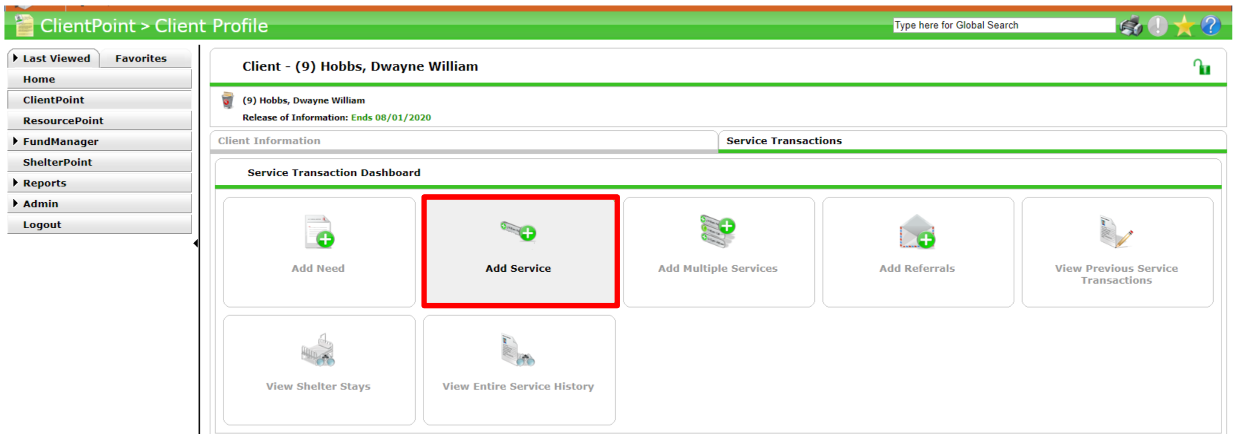
3. Go to *ClientPoint* and navigate to the *Client Profile.*



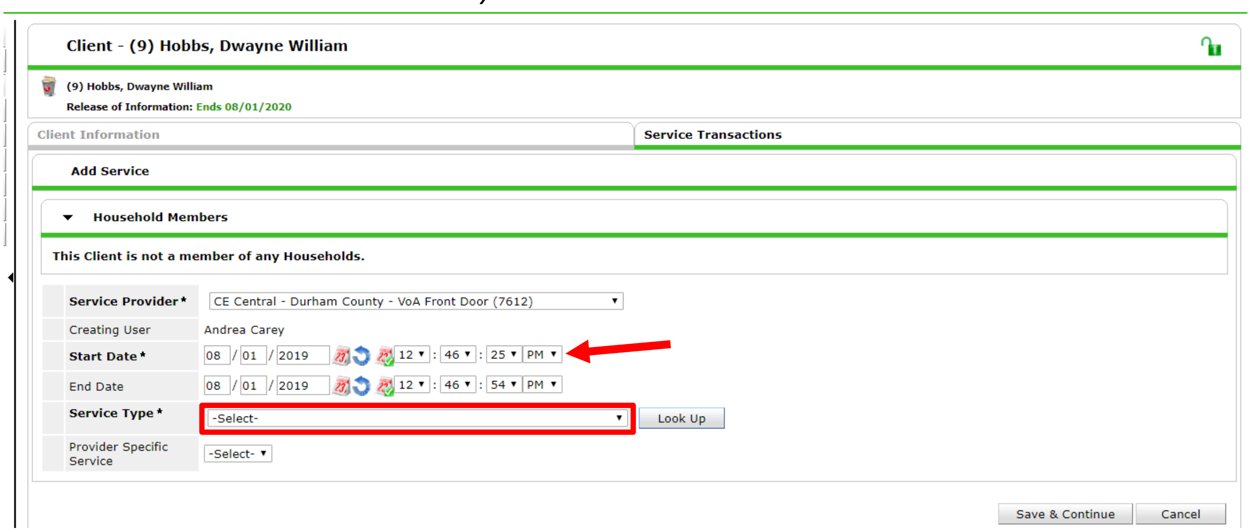
4. Click on the *Service Transactions* tab.



5. Click on the *Add Service* box.



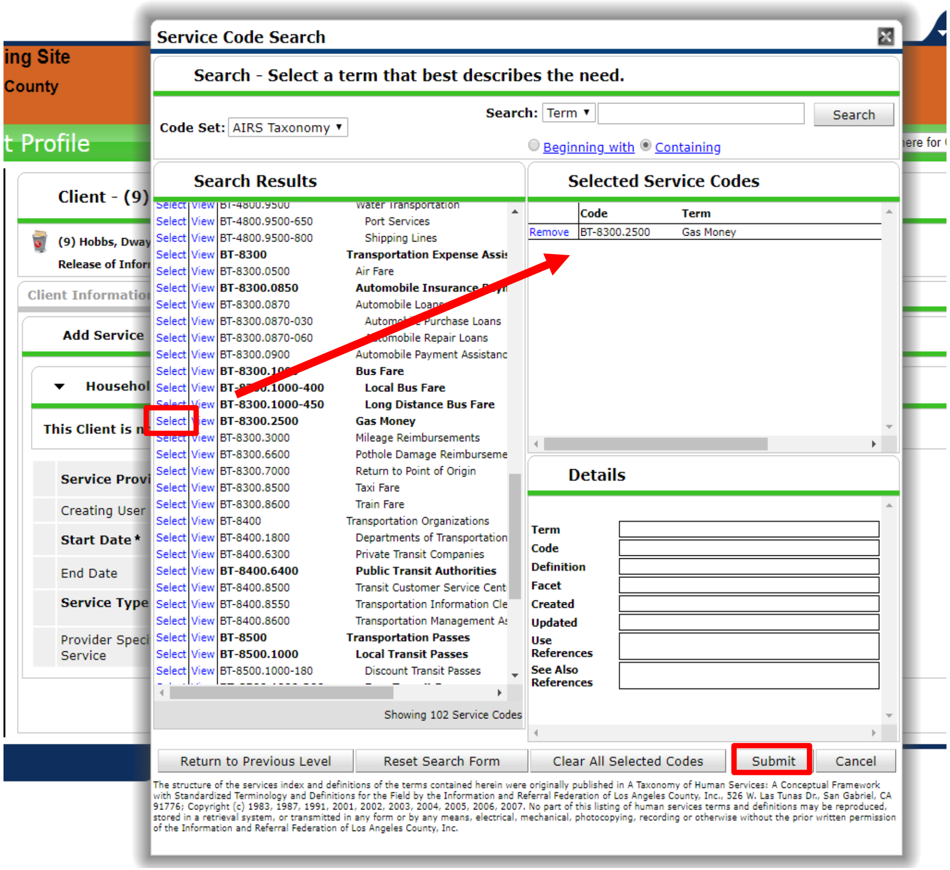
6. If working with a household, make sure only the *Head of Household* has a checked box under *Household Members*. Leave other household members boxes unchecked.
7. Confirm the *Service Provider* is the correct Front Door Project.
    a. If not, change EDA mode and restart recording this *Service Transaction*.
8. Add the *End Date* for the same date.
9. Select the appropriate *Service Type.*
    a. If available, select the *Service Type* from the drop-down list.
        i. The most common services for Diversion Housing Solutions are:
            1. *Homeless Motel Vouchers* for hotel or motel stays.
            2. *Rental Deposit Assistance* for security deposits.
            3. *Rent Payment Assistance* for rent.



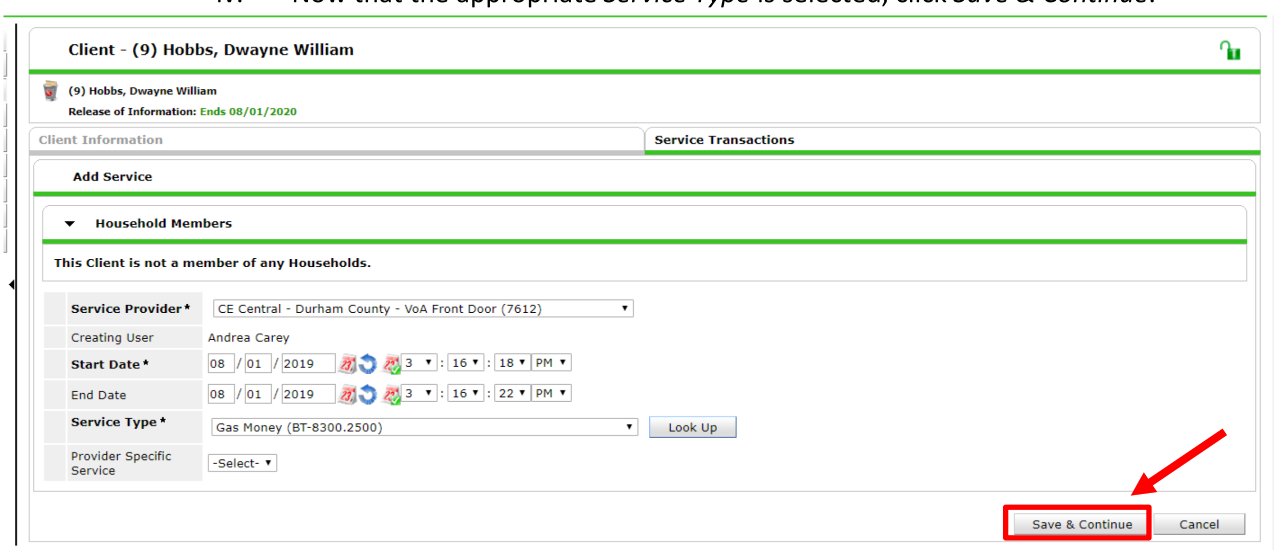
    b. If the appropriate *Service Type* is not there, click *Look Up*.
    Specific types of services can be navigated to through the categories on the left or searched for through the *Search Term* bar on the right.
        i. Most common categories:

1. *Basic Needs* for food, housing, material goods like household appliances, transportation, or utilities.
2. *Criminal Justice and Legal Services* for legal services or legal education services related like landlord/tenant assistance or fair housing discrimination assistance.

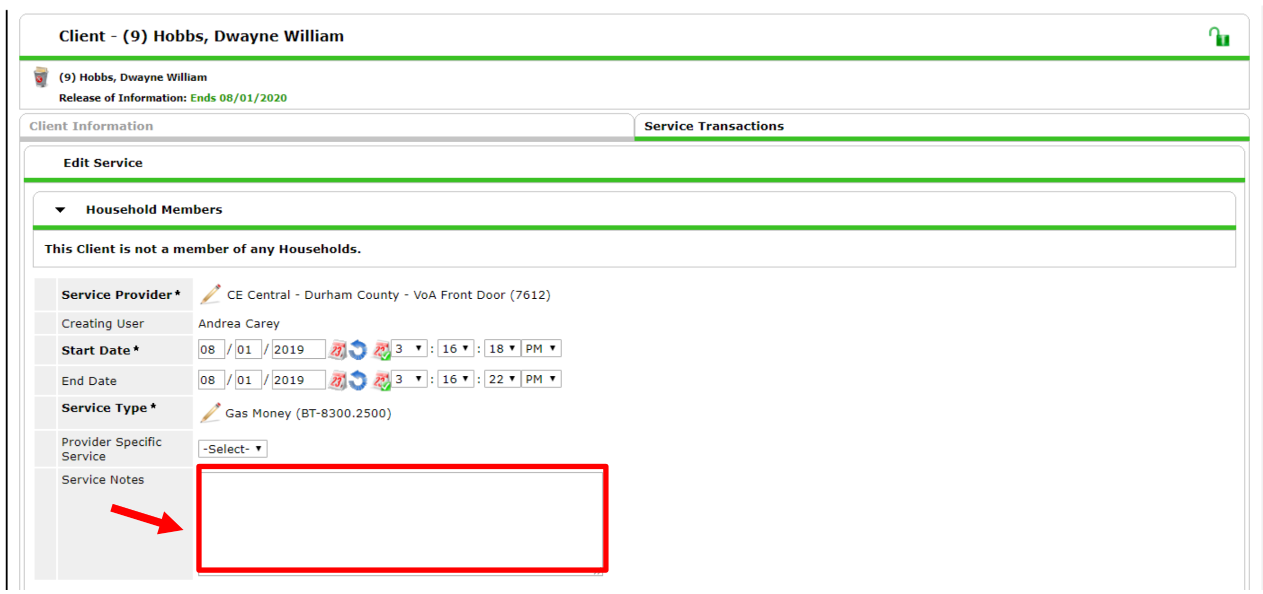
ii. Use the blue *Select* link to identify the appropriate service code.
iii. Then click on *Submit* at the bottom.



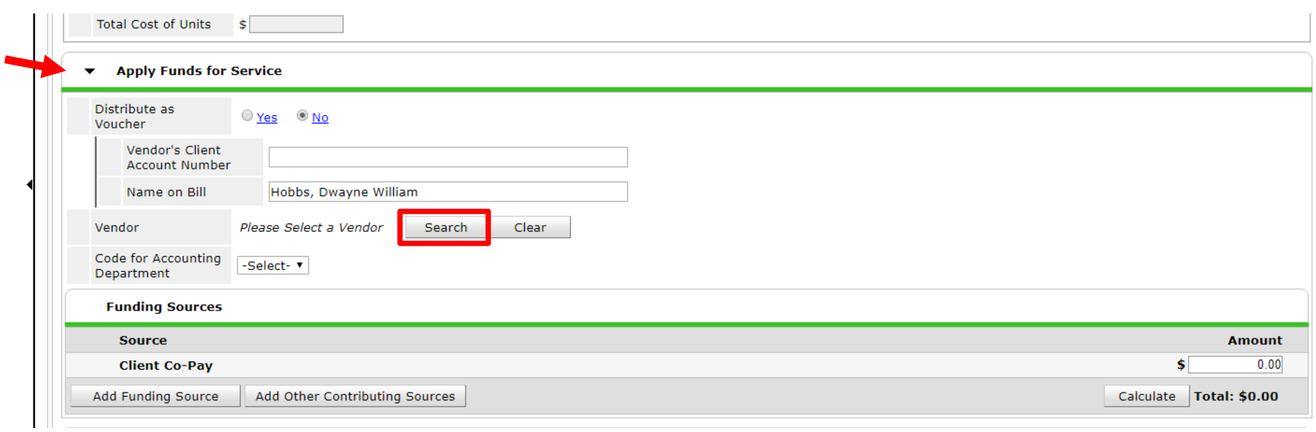
iv. Now that the appropriate *Service Type* is selected, click *Save & Continue*.



10. Add *Service Notes* specific to this service.

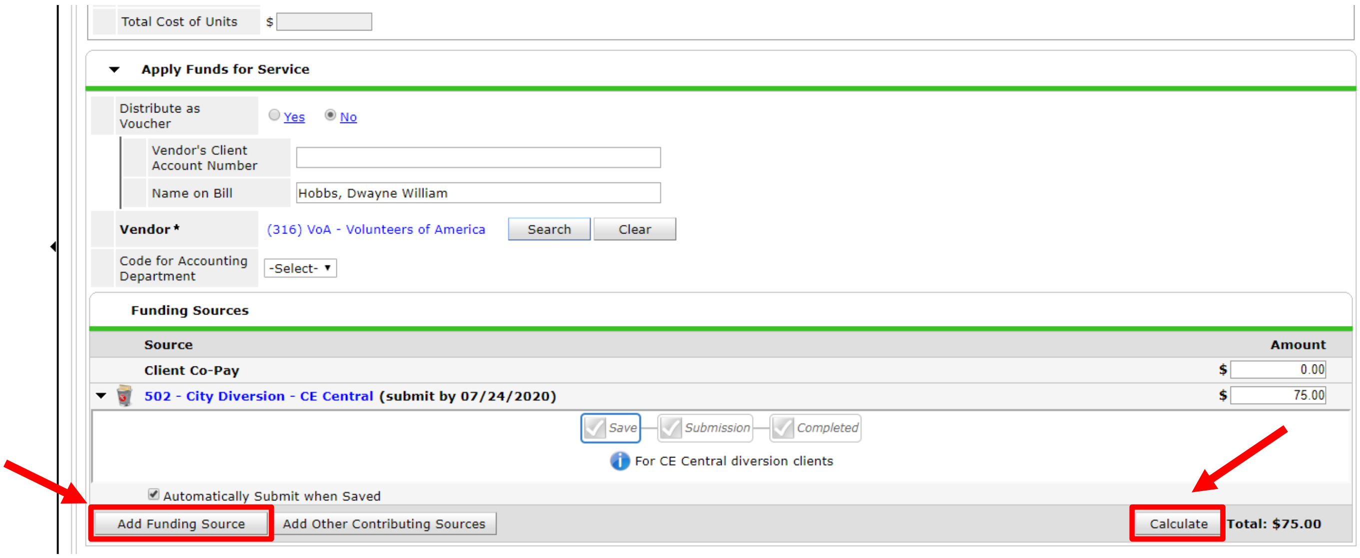


11. Skip *Service Costs* section.
12. Find the *Apply Funds for Service* section and open by clicking on the black arrow.
    a. *Distribute as Voucher* should be set to *No*.
    b. *Vendor's Client Account Number* should be blank.
    c. *Name on Bill* should be the correct name of the client (for matching to finance/accounting department).
    d. *Vendor* should be your agency name.
        i. Click *Search* and enter DSS or VoA in search bar and click Search button.
        ii. Click on the green plus sign to select the correct *Vendor*.
    e. *Code for Accounting Department* should be blank.



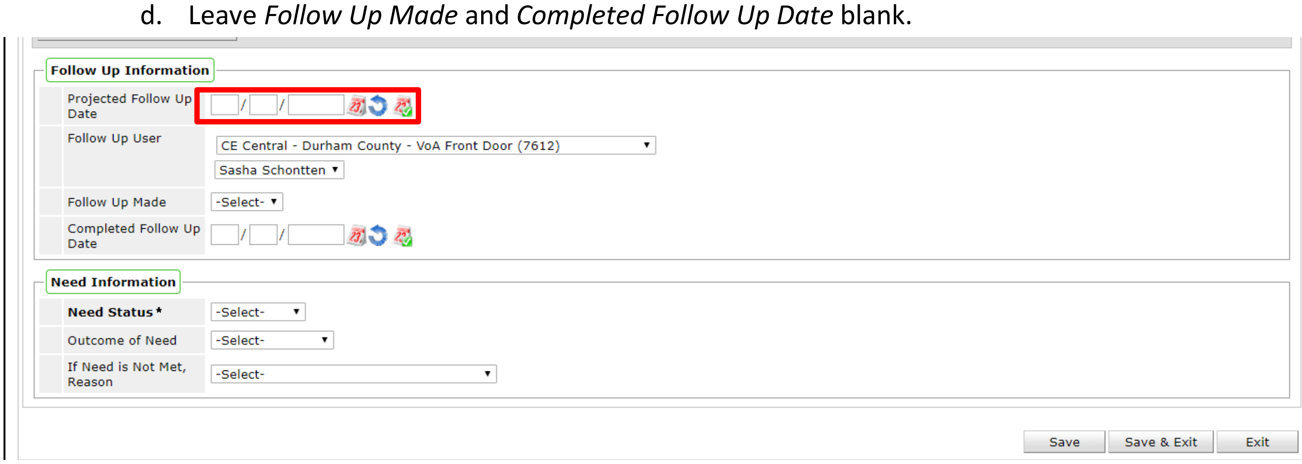
13. Add a *Client Co-Pay* to *Funding Sources* if applicable.

14. Find the *Funding Sources* section and click on *Add Funding Source.*
15. Find the appropriate fund called *502 - City Diversion - Entry Point* and click on the green plus sign next to it.
16. Add the amount of financial assistance used and click *Calculate* for the total to appear.



17. Skip the *Conditional Commitments* and *Support Documentation* sections.

18. If the client is being diverted to a temporary location, add *Follow-up Information.*
    a. Add the appropriate date for *Projected Follow Up Date.*
        i. If one is decided with the client, use that.
        ii. If no date is agreed to, select a date in one week.
    b. Confirm the *Follow Up User* has the Front Door project selected.
    c. Select the appropriate *Case Manager* from the drop-down under the project name.
    d. Leave *Follow Up Made* and *Completed Follow Up Date* blank.



19. Scroll to the *Need Information* section and change *Need Status* to *Closed* and *Outcome of Need* to *Fully Met.*
20. Click *Save & Exit* to complete the record for diversion funds used.

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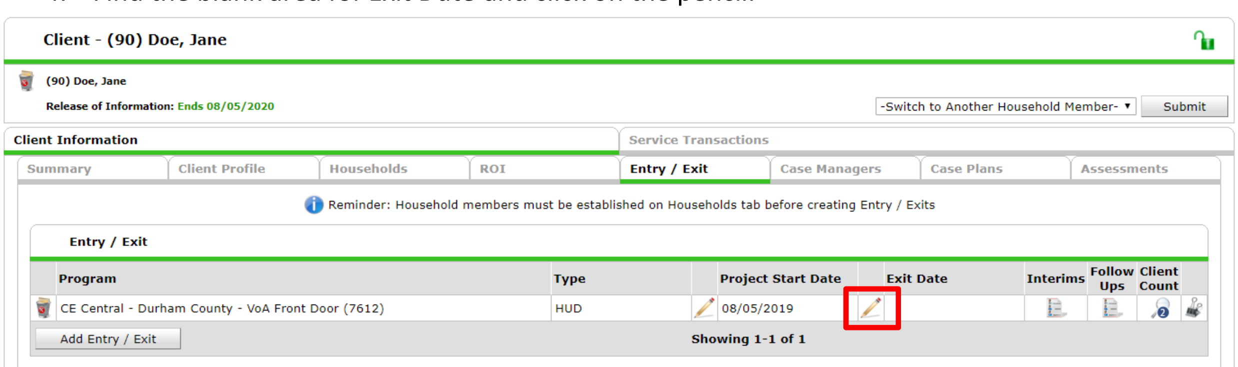
Successful Diversion and Exit

If client can be diverted, exit them in HMIS (skip to unsuccessful diversion section if not). Make sure to indicate whether this is a stable or temporary diversion.

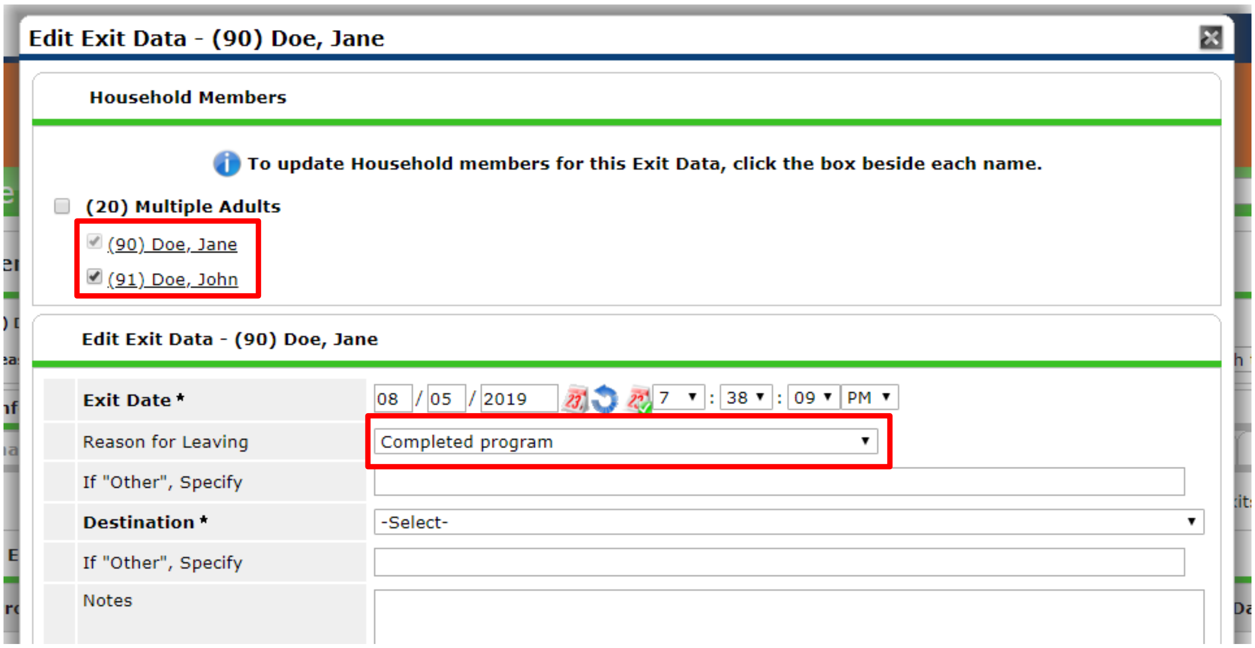
1. Once logged into *HMIS*, confirm *EDA* for the correct Front Door project.
2. Go to *ClientPoint* to search for the *Head of Household.*
3. Go to the *Entry/Exit* tab.
4. Find the blank area for *Exit Date* and click on the pencil.



5. Complete the *Edit Exit Data* section.
   a. If the client is in a household, check the boxes for all members who are being diverted.
   b. Complete the *Reason for Leaving* and *Destination*.

i. Common *Reasons for Leaving*:

1. *Completed program* is when a client leaves after moving into housing with support from the shelter.
2. *Left for housing opp. before completing program* means that the client found other shelter or housing without the support from Entry Point.
3. *Does not or no longer qualifies for the program* is used when the client can no longer use diversion services (financial or mediation) and is no longer eligible for shelters.
4. *Unknown/Disappeared* is used when Entry Point staff do not know the reason for leaving.

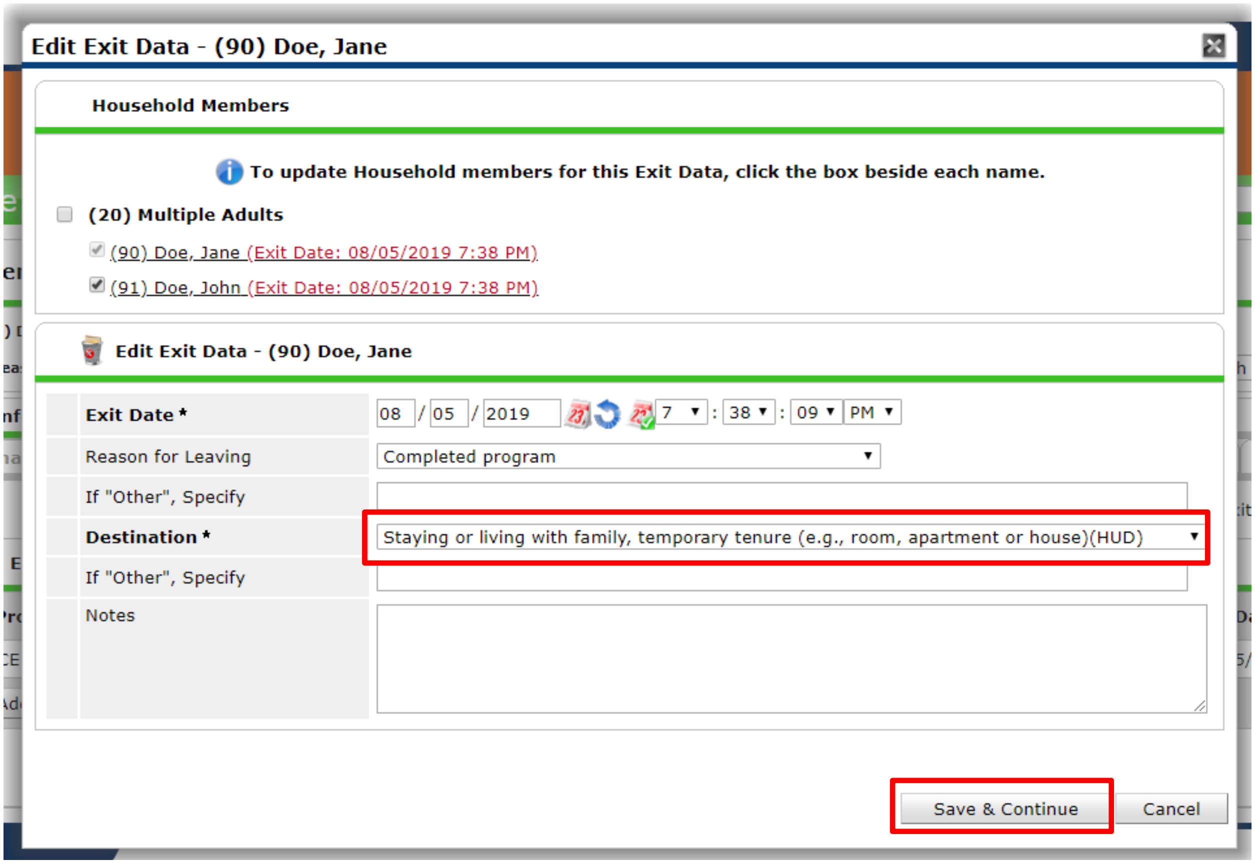


ii. Common Destinations:

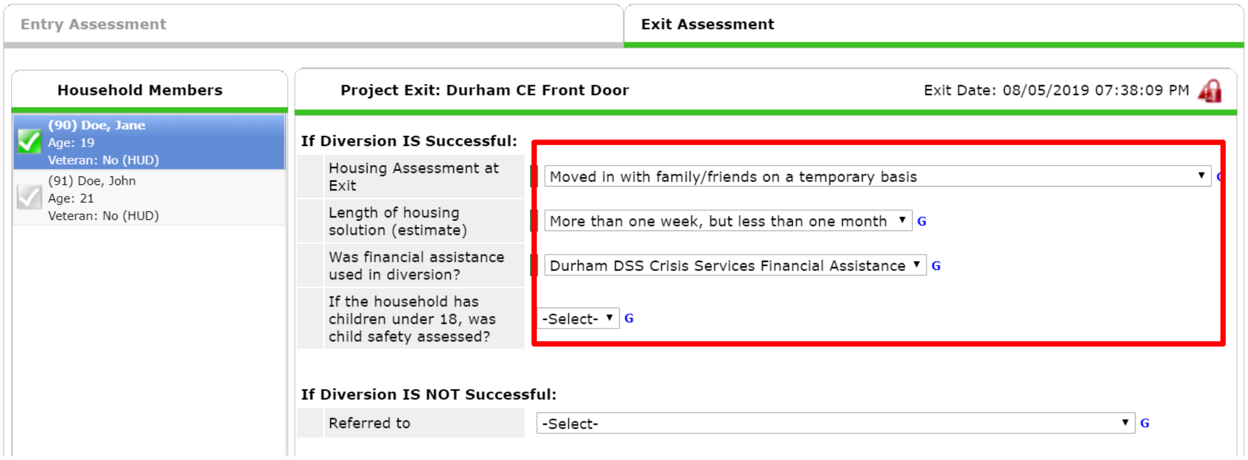
1. *Emergency Shelter, including hotel or motel stay paid for with emergency shelter voucher*. Use this if the diversion location refers to a temporary location paid for by Entry Point or another community non-profit.(Also used for shelter bed placement)
2. *Hotel or motel stay paid for without emergency shelter voucher* is when the client pays for a temporary location themselves.
3. *Rental by client, no ongoing subsidy* is for clients renting without formal program or non-profit support beyond one-time arrears or deposits.
4. *Residential project or hallway house with no homeless criteria* is utilized for clients choosing to enter Durham Rescue Mission’s program.
5. *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.

6. *Staying or Living with Family* has two options, temporary and permanent tenures.
7. *Staying or Living with Friends* has two options, temporary and permanent tenures.
8. *No Exit Interview Completed* is used when no information about where the client is sleeping that night is available despite best efforts to collect the information.

c. Click Save & Continue



6. Complete the *Project Exit: Durham CE Front Door* Assessment with the diversion results. There are three Sections to review.
7. Complete all three questions in *If Diversion is Successful* section.
   a. Select appropriate option for *Housing Assessment at Exit*.
   b. Select the estimated length of time the client/household can stay at the location they are being diverted to.
   c. Record whether financial assistance was used and what type.
   d. Select whether the location was assessment for child safety (if applicable).



e. Skip the questions under *If Diversion is not Successful*.

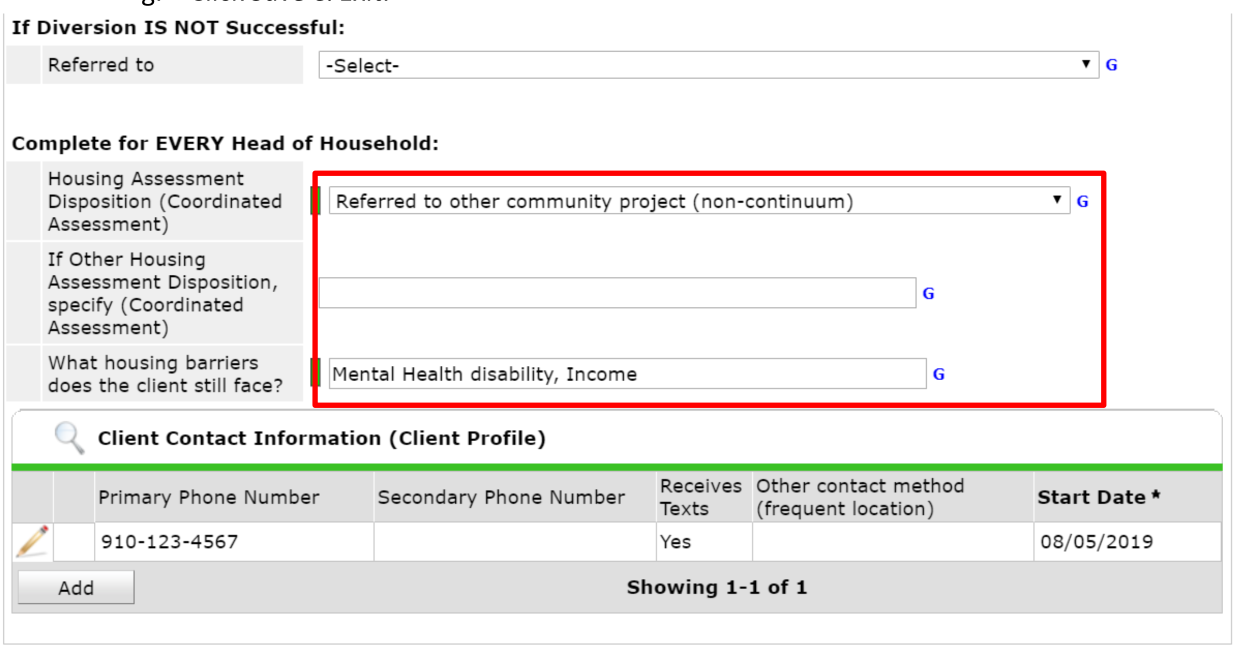
f. Fill out everything in the *Complete for EVERY Client* section.

    i. Identify what happened to the client's housing situation with the *Housing Assessment at Exit.*

    ii. Record *What housing barriers* remain an obstacle for the client/household in the text box.

    iii. Update or add additional *Client Contact Information* for future follow-up.

g. Click *Save & Exit.*



Diversion to a Permanent Situation

8. If diverted to a permanent or ongoing housing situation (estimated to last more than four months):

    a. No further data entry required.

Diversion to a Temporary Situation

If diverted to a temporary situation of four months or less, go to Section: Temporary Diversion Case Management.

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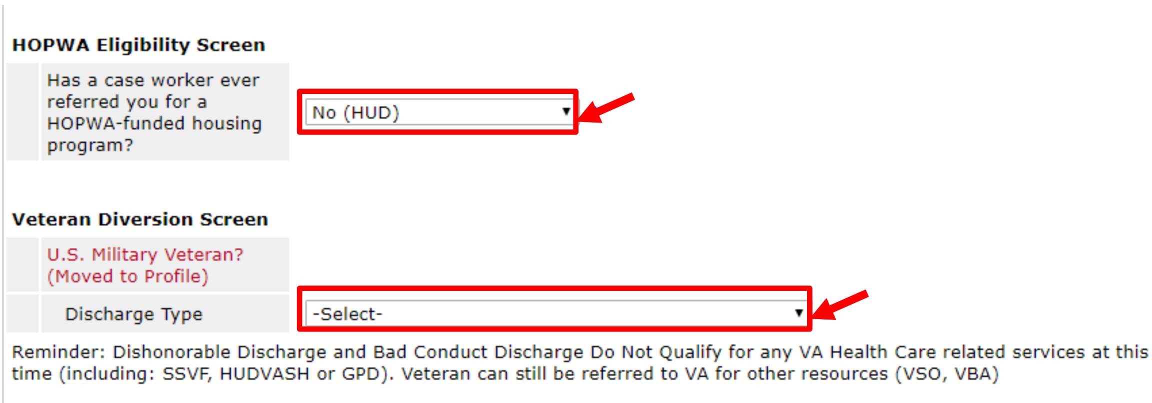
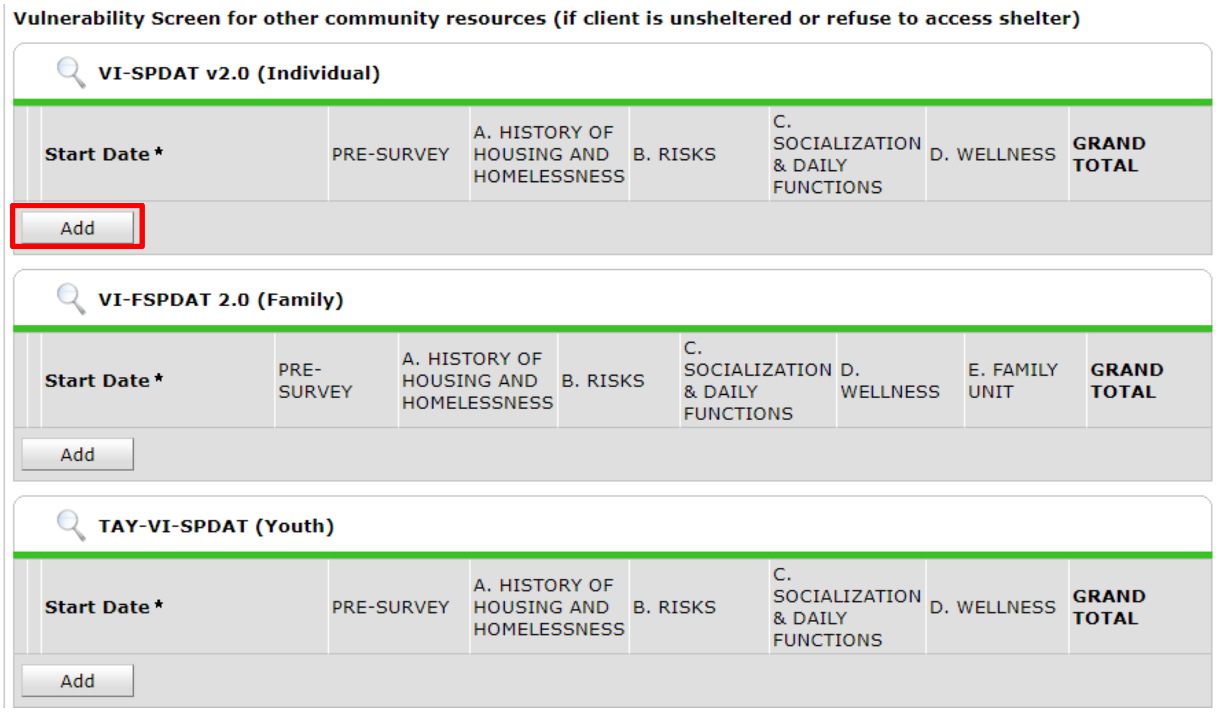
Section: Unsuccessful Diversion and Shelter Referral

If client is unable to be diverted and is still seeking shelter:

1. Do not *Exit* client/household.
2. Complete the *HOPWA Eligibility Screen* for clients identifying a *Disabling Condition* and at your discretion.
3. Complete the *Veteran Diversion Screen* for clients identifying as a U.S. *Military Veteran* at your discretion.



4. Complete the appropriate version of the *VI-SPDAT* assessment for clients who are currently unsheltered or ineligible for emergency shelter in Durham.



Vulnerability Screen for other community resources (if client is unsheltered or refuse to access shelter)

VI-SPDAT v2.0 (Individual)

Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL
Add						

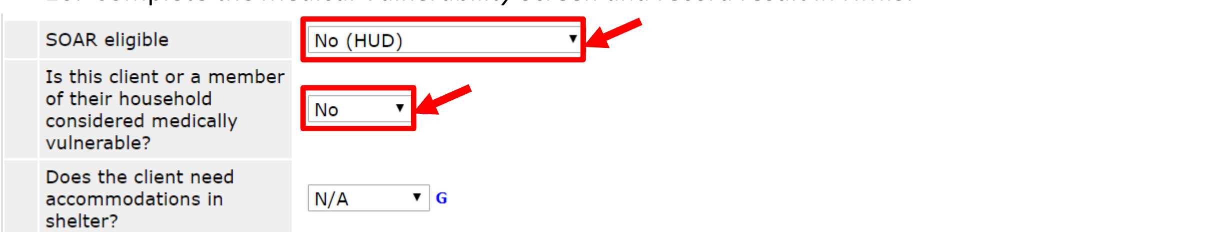
VI-FSPDAT 2.0 (Family)

Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	E. FAMILY UNIT	GRAND TOTAL
Add							

TAY-VI-SPDAT (Youth)

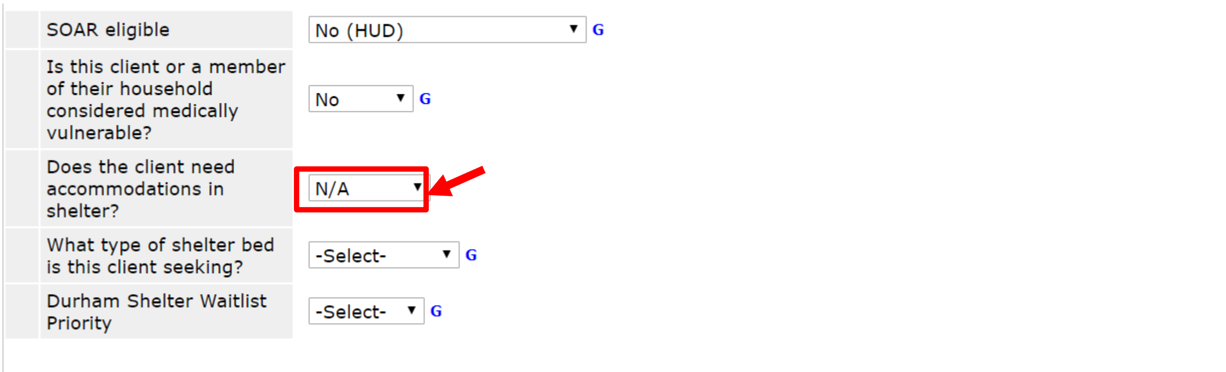
Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL
Add						

9. *Conduct SOAR Eligibility screen at your discretion* (if they have a disability but are not receiving SSI/SSDI).
10. Complete the *Medical Vulnerability Screen and record result in HMIS.*



SOAR eligible	No (HUD)
Is this client or a member of their household considered medically vulnerable?	No
Does the client need accommodations in shelter?	N/A G

11. Complete whether or not this client needs accommodations if referred to a shelter. Make sure to include information on any accommodation in shelter referral notes.
    a. Select *Safety* if there are things that can be done in the shelter to make the client feel safe, such as selecting a bed closest to the front desk.
    b. Select *Mobility* if the client may need support with physical access to the shelter
    c. Select *Language* if the client may need assistance communicating and/or if the client's primary language is not English
    d. Select *Hearing* if the shelter could take steps to assist a client who is hard of hearing
    e. Select N/A if the client does not need accommodations if referred to a shelter.

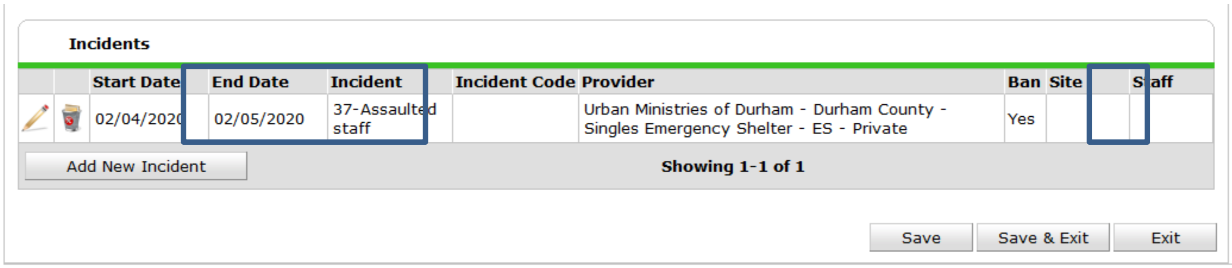


f. The next two questions help Shelter Waitlist Prioritization and should be answered for all Heads of Households and other adults without children.
   i. Record *what type of shelter bed this client is seeking*, given their household composition.
      1. Select *Family Room* if a client is a Head of Household with a group including children 17 and younger.
      2. Select *Single Beds* if a client is an individual adult or an adult with a group of adults.
   ii. Record the *Durham Shelter Waitlist Priority* level given their previous responses. Follow the table below to assign the correct Priority.

Experiencing Category 1 or 4 Homelessness	*Has a medical vulnerability + Durham resident*	*1*
	Durham resident	*2*
	Has a medical vulnerability + NOT Durham resident	*3*
	NOT Durham resident	*4*
Experiencing Category 2 Homelessness	*Durham resident*	*5*
	NOT Durham resident	*Refer to home CoC*

12. Determine if the client has an active Referral Suspension
   a. Save & Exit the Diversion/Intake Assessment
   b. Select the Client Profile tab
   c. Find the Incidents sub-assessment box by scrolling to the bottom o the page
   d. Determine if today's date is covered by the date range and the Ban column says "Yes"
      i. Ban = Yes, client cannot be referred to the Provider listed

ii. Ban = No or blank, client can be referred to the Provider listed



If a Year-Round Bed or Room is available

1. If the Shelter Waitlist is empty and bed is available:
    a. Note the *Head of Household Client ID*.
    b. Change *EDA* to Entry Point Bed Placement project.
    c. Follow the steps for checking clients into shelter beds (below).
2. If the S Waitlist is not empty:
    a. Check if the client is next on the priority list based on eligibility (household size, gender, etc.) and prioritization. Go to Section: Prioritization of Waitlist for the steps to find the next client/household to place in shelter.
    b. If this client is next, refer to steps to check clients in for bed placement (next section).
    c. If client is not next, do not check household into bed placement.
        i. Household is already on waitlist because of open Front Door project entry.
        ii. Record case notes on the *Client Profile* tab. Go to Add Case Notes to *Client Profile* for steps.
        iii. Confirm additional contact information is correct so timely referral can take place in the future.

If a Year-Round Bed or Room is unavailable

Do not exit the client. Leave their entry (on the Entry/Exit tab) open. This will keep the client on the Shelter Waitlist.

If a White Flag Bed or Room is available

The goal is to not present barriers to receiving a white flag bed while still trying to get as many people as possible through the diversion process.

1. Communication, as always, is paramount. The Shelter with White Flag beds (UMD) will alert Entry Point as soon as it is clear beds will be available.

2. White Flag beds will not be filled with a referral from Entry Point. The UMD can fill them directly.
    a. If someone comes to Entry Point who needs a White Flag bed, complete a normal diversion and intake conversation. If that person still needs a bed tonight, Entry Point will direct them to UMD for a white flag bed.
    b. No direct bed placements can be made.
3. Entry Point will send staff (if available) in the late afternoon/early evening hours after the daytime intakes at DSS close, to do intakes at UMD.
    a. The purpose is to increase communication and make sure that people still get access to diversion assistance and onto the on-going Shelter Waitlist.
4. If Entry Point cannot send someone to UMD, UMD will direct people to call the Referral line to complete an intake over the phone.
    a. Entry Point intakes are not required to receive a White Flag bed, but having an intake done opens up other resources.
5. The next morning after a White Flag night, Entry Point will review who was in the white flag beds the night before and make sure everyone received an intake.
    a. If possible, Entry Point staff will attempt to complete an intake:
        i. At the shelter (if it's a multi-day event), or;
        ii. Through contact information. Work with UMD staff to contact them in another way for an intake, if possible.

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Section: Shelter Vacancies and Bed Placement

All shelter beds at United Ministries of Durham and Families Moving Forward will be tracked in HMIS. Entry Point will keep track of which beds are filled and which are available in the Master Inventory project for Bed Placement in HMIS. Entry Point should keep this inventory as up to date as possible and update the inventory as soon as vacancies are reported by shelters.

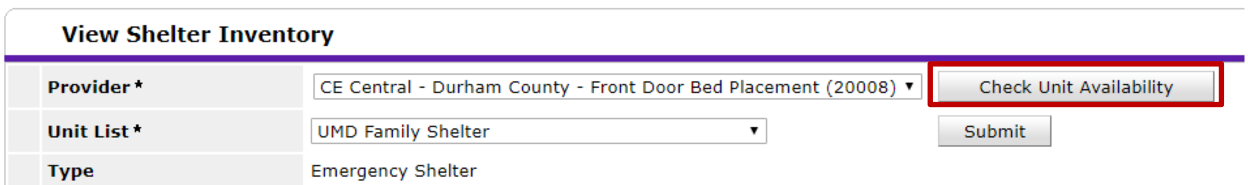
View Master Bed Placement Inventory

The master bed inventory tracks the total beds and all clients in the beds in each of the three shelters at any given time.

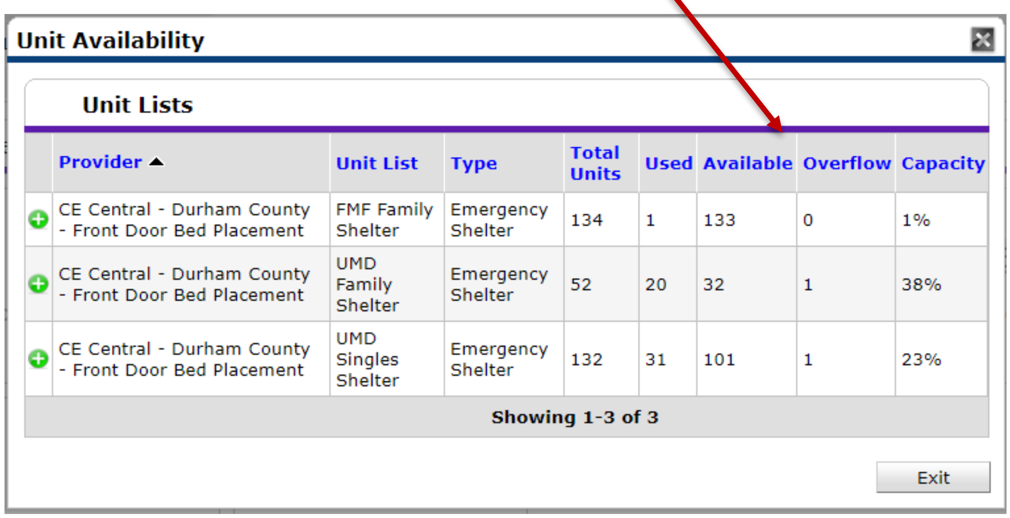
1. To see the full list, first access the *ShelterPoint* module from the menu on the left side of the HMIS home screen.

Click Here!

2. Optional: use *Check Unit Availability* button for a quick view on available beds and overall usage.



   a. *Units* in this view are beds (not rooms) and *Capacity* is calculated from the number of occupied and held beds.



Unit Availability

Unit Lists

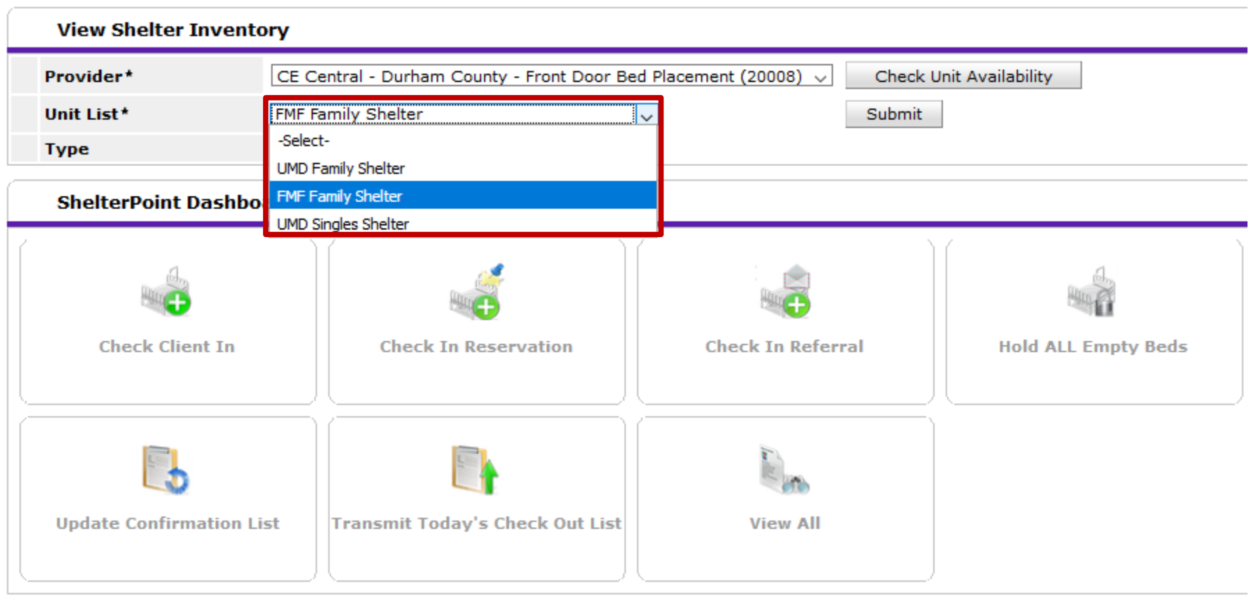
Provider	Unit List	Type	Total Units	Used	Available	Overflow	Capacity
CE Central - Durham County - Front Door Bed Placement	FMF Family Shelter	Emergency Shelter	134	1	133	0	1%
CE Central - Durham County - Front Door Bed Placement	UMD Family Shelter	Emergency Shelter	52	20	32	1	38%
CE Central - Durham County - Front Door Bed Placement	UMD Singles Shelter	Emergency Shelter	132	31	101	1	23%

Showing 1-3 of 3

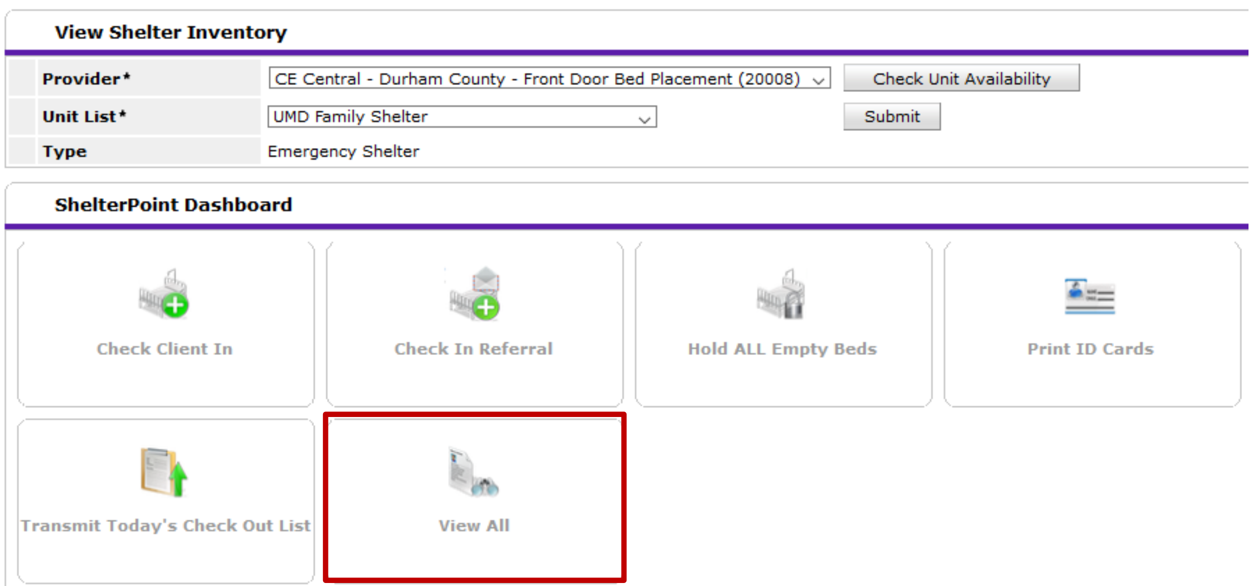
Exit

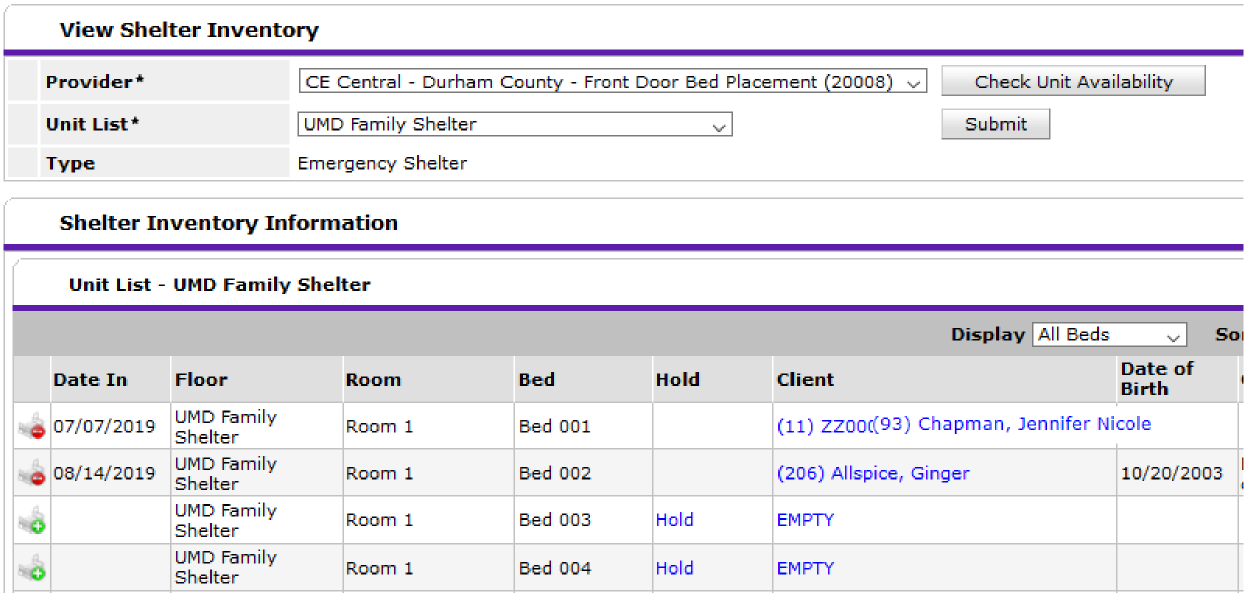
   b. Always check clients in before telling a client there is a bed for them.

3. Then use the dropdown menu under *Unit List* to access the list. **Please note that each shelter has a separate inventory that is accessed by selecting the correct shelter from the menu.**



4. Then click on *View All* to see the entire bed list for that shelter.





View Shelter Inventory

Provider*	CE Central - Durham County - Front Door Bed Placement (20008)
Unit List*	UMD Family Shelter
Type	Emergency Shelter

Check Unit Availability

Submit

Shelter Inventory Information

Unit List - UMD Family Shelter

Display All Beds

Date In	Floor	Room	Bed	Hold	Client	Date of Birth
07/07/2019	UMD Family Shelter	Room 1	Bed 001		(11) ZZ00((93) Chapman, Jennifer Nicole	
08/14/2019	UMD Family Shelter	Room 1	Bed 002		(206) Allspice, Ginger	10/20/2003
	UMD Family Shelter	Room 1	Bed 003	Hold	EMPTY	
	UMD Family Shelter	Room 1	Bed 004	Hold	EMPTY	

5. *ShelterPoint* bed lists contain a lot of information beyond whether a client is checked in or not. There are 11 columns and each contains important details about client stays.

   a. *Date In* – this indicates the date that the person was assigned the bed.

   b. *Floor* – each shelter will be represented as a floor. There are currently 3 floors:

      i. UMD Singles Shelter

      ii. UMD Family Shelter

      iii. FMF Family Shelter

   c. *Room* – this indicates the unit/shelter section that has those beds (e.g. UMD Singles Shelter has two “rooms” → Female Wing and Males Wing) to ensure that people are assigned to an eligible bed.

   d. *Bed* – this indicates the actual bed and/or bunk where the person will stay.

   e. *Hold* – all empty beds automatically show a “Hold” in this column. This column will not be useful for Entry Point staff as they are checking in every applicable person.

   f. *Client* – the name of the person checked into the bed.

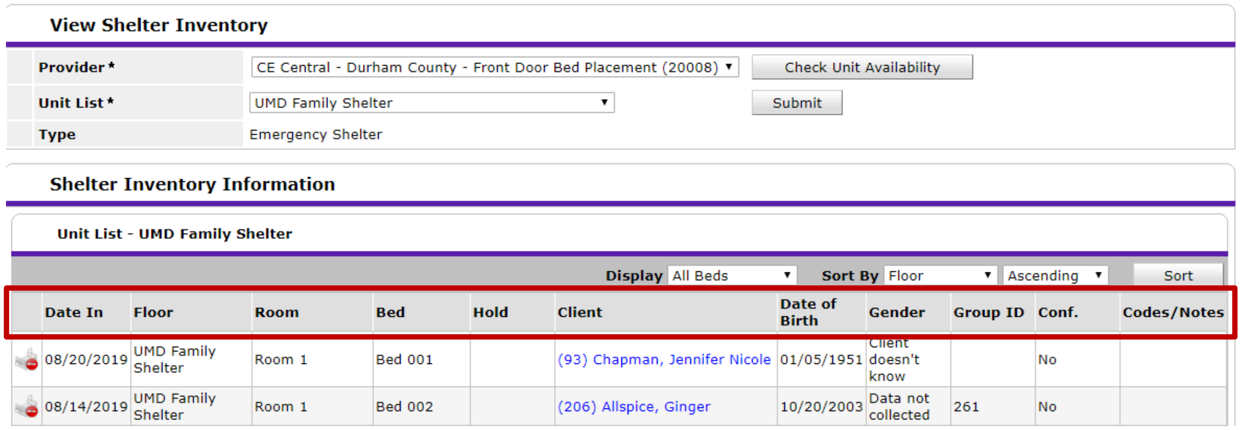
   g. *Date of Birth* – person’s birthdate.

   h. *Gender* – person’s self-identified gender.

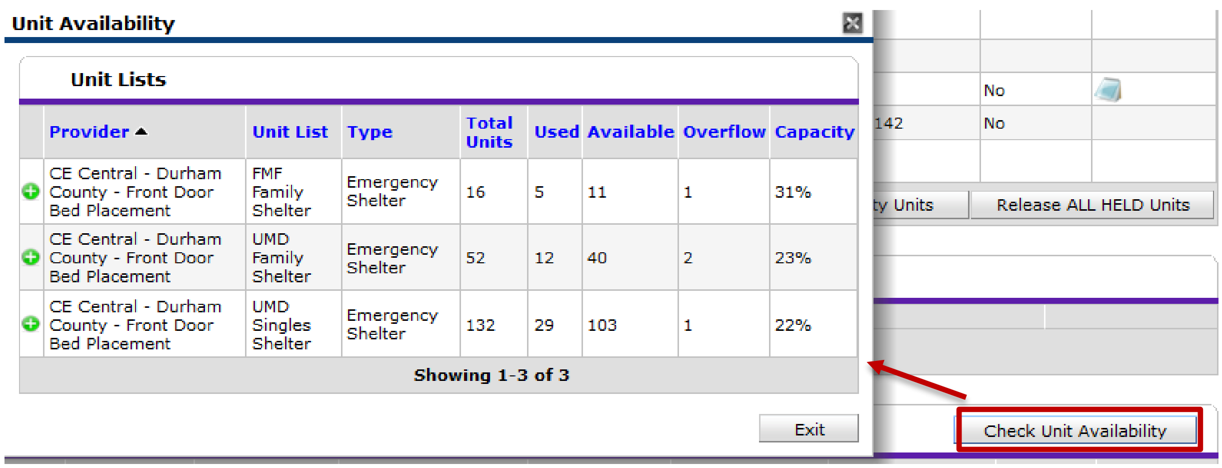
   i. *Group ID* – each unique household will have a Group ID. This ID number will identify at a glance when people are presenting together for shelter.

   j. *Conf.* – this indicates whether the client has been confirmed as actually needing and/or staying in the bed. This feature is not part of the Entry Point workflow.

k. *Codes/Notes* – this is one of the ways Entry Point staff can communicate with each other.



3. Optional: Scroll to the bottom of the bed list to use *Check Unit Availability* button for a quick view on available beds and overall usage



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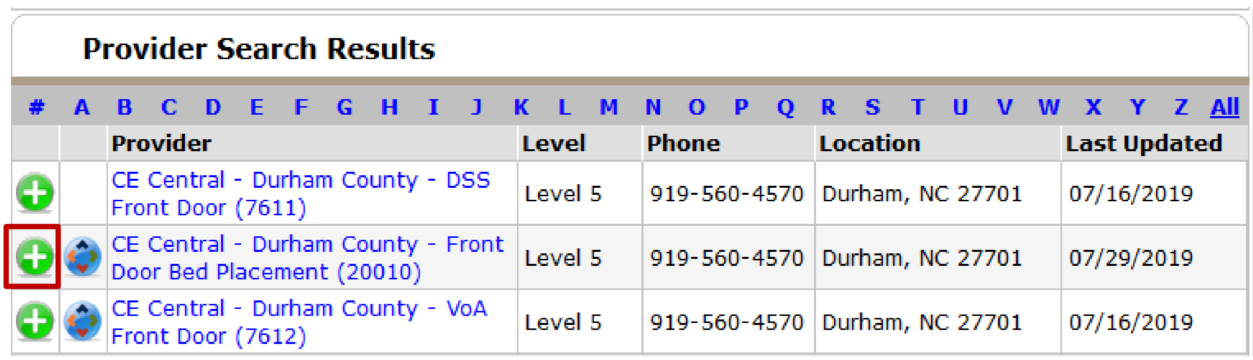
Check-In Clients into Shelter Beds

1. Entry Point staff determine if the client is next for shelter waitlist priority and eligible to have a Entry Point Bed Placement.

2. Once staff determines that the person/household needs a bed placement, they will need to access the project in HMIS.

a. Staff clicks on the *Enter Data As* button in the upper right side of screen to access a list of available projects.
***Please note that you will see your own name instead of "Durham CE Administrator." ***

b. Staff clicks the plus sign next to the correct project to access the community bed list: *Entry Point – Durham County – Bed Placement (20010).*



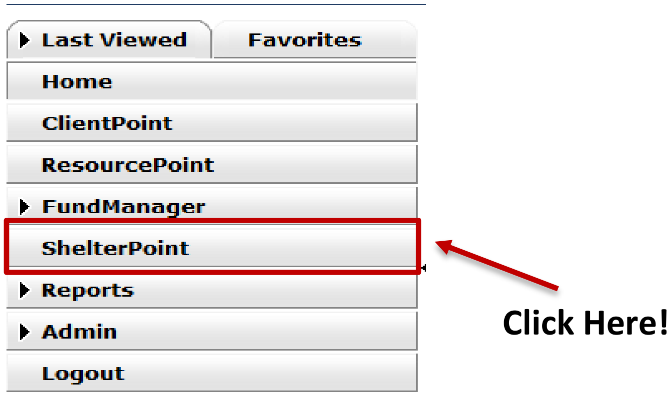
Provider Search Results

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

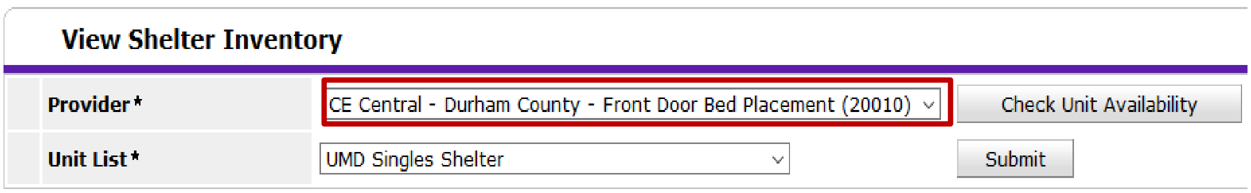
		Provider	Level	Phone	Location	Last Updated
		CE Central - Durham County - DSS Front Door (7611)	Level 5	919-560-4570	Durham, NC 27701	07/16/2019
		CE Central - Durham County - Front Door Bed Placement (20010)	Level 5	919-560-4570	Durham, NC 27701	07/29/2019
		CE Central - Durham County - VoA Front Door (7612)	Level 5	919-560-4570	Durham, NC 27701	07/16/2019

c. Double check that you selected the correct project by hovering over the blue words to see the project name that appears.

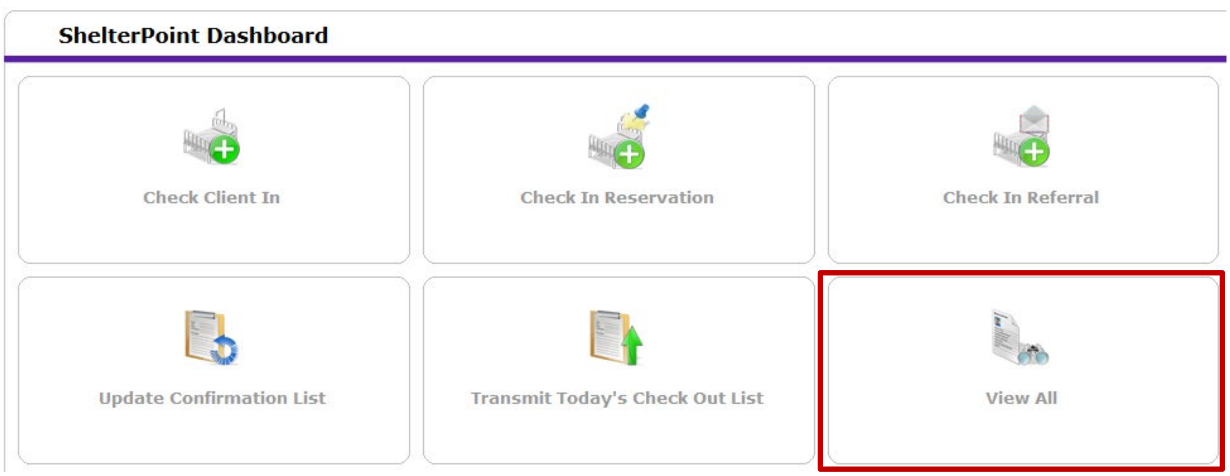
3. Click on the *ShelterPoint* module from the menu on the left side to get to the community bed list.



4. Make sure that the *Provider* reads *Entry Point – Durham County – Bed Placement (20010)* and the *Unit List* reads the name of the shelter that you want to refer to before clicking the *Submit* button.

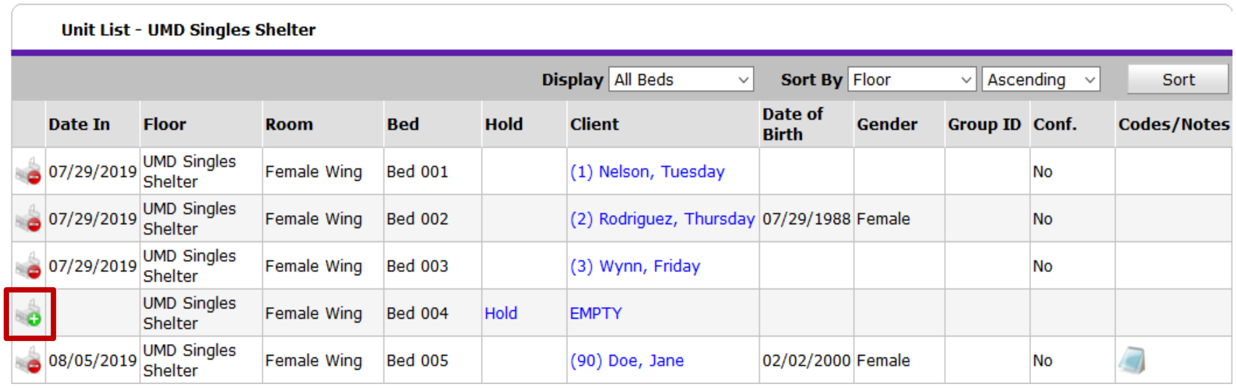


5. Click the *View All* button to access the full shelter bed list.



6. The bed list represents the beds for Coordinated Entry participating shelters. Identify the appropriate bed.
   a. They are represented by name (Floor), by specification such as for males, females, or families (Room), and by bed (Bed).

7. Click on the green plus sign to assign a client to the open bed.
   a. Make sure to use the EID chat system to alert other Entry Point staff of the client/household about to be checked in.

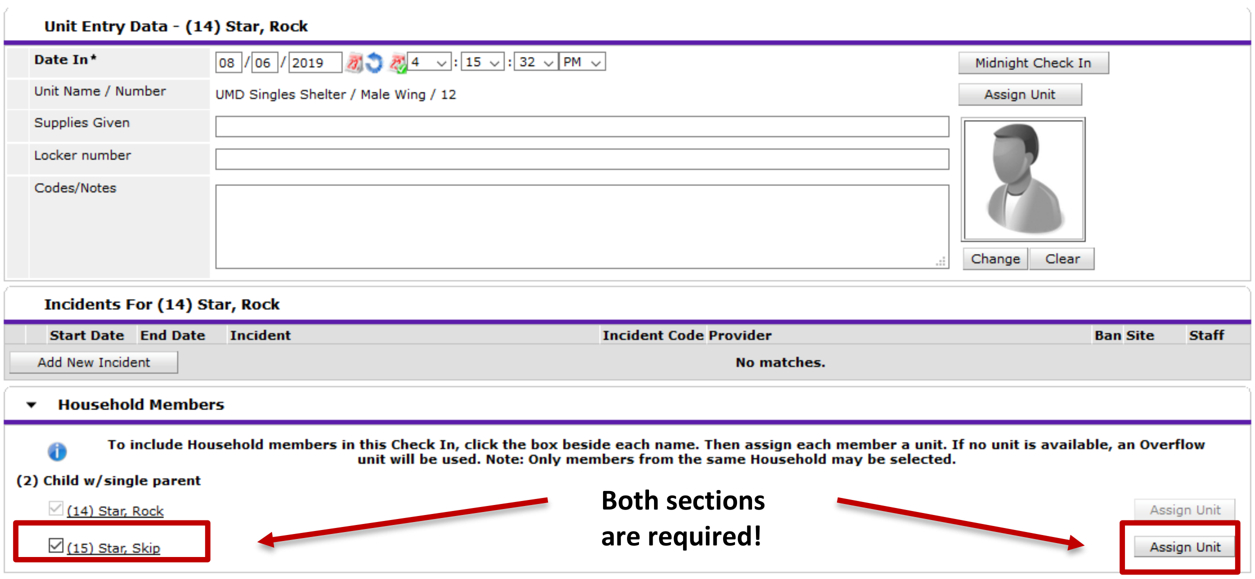


Unit List - UMD Singles Shelter

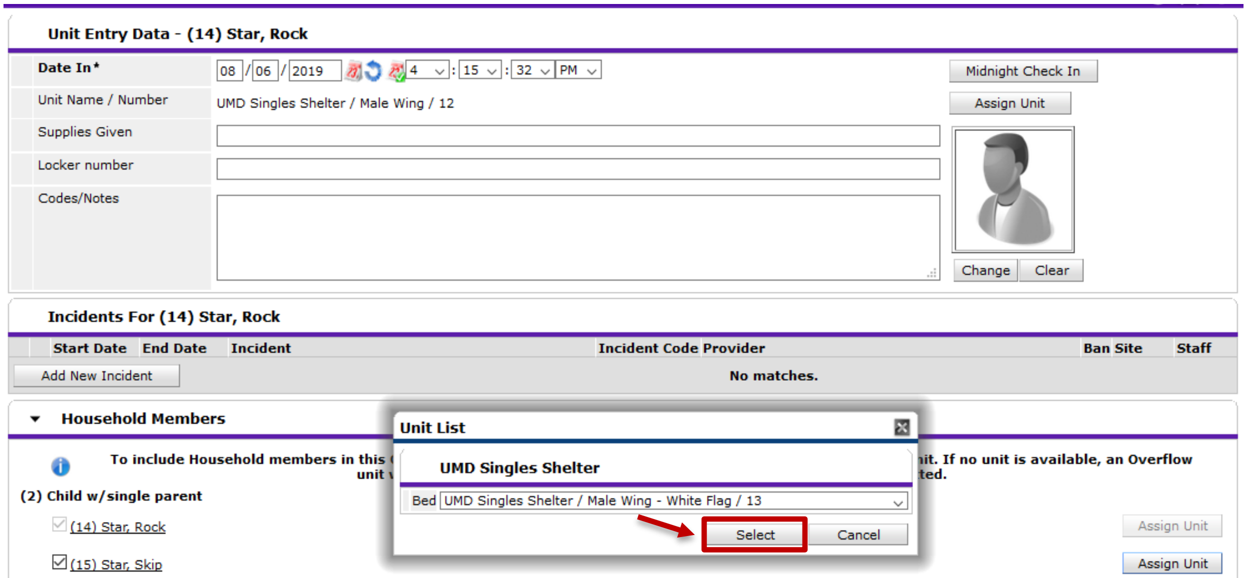
Display All Beds | Sort By Floor | Ascending | Sort

	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
	07/29/2019	UMD Singles Shelter	Female Wing	Bed 001		(1) Nelson, Tuesday				No	
	07/29/2019	UMD Singles Shelter	Female Wing	Bed 002		(2) Rodriguez, Thursday	07/29/1988	Female		No	
	07/29/2019	UMD Singles Shelter	Female Wing	Bed 003		(3) Wynn, Friday				No	
		UMD Singles Shelter	Female Wing	Bed 004	Hold	EMPTY					
	08/05/2019	UMD Singles Shelter	Female Wing	Bed 005		(90) Doe, Jane	02/02/2000	Female		No	

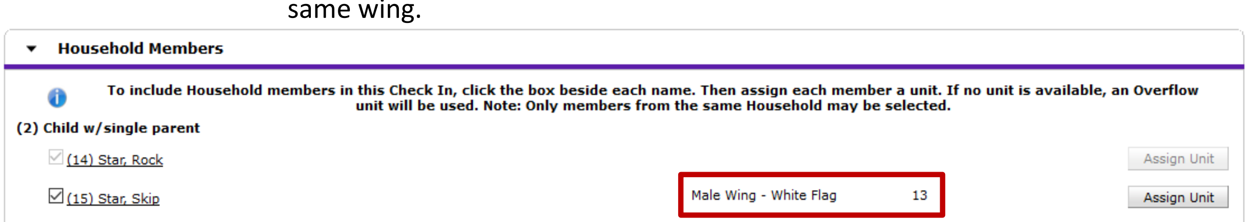
8. If the client is in a household:
   a. Place each household member into the correct bed by checking their box and then clicking on *Assign Unit* to place member in a bed.



   b. Select the appropriate bed for the household member, depending on family composition, age, and availability of beds and click *Select*.
      i. Households should be grouped together. In this example, Rock Star is in bed 12 in the UMD Male Wing so Skip Star should be in bed 13 in the same wing.



ii. Now the household is assigned to the right beds, either in the same room or same wing.



9. Confirm that the client is checked into the correct bed.

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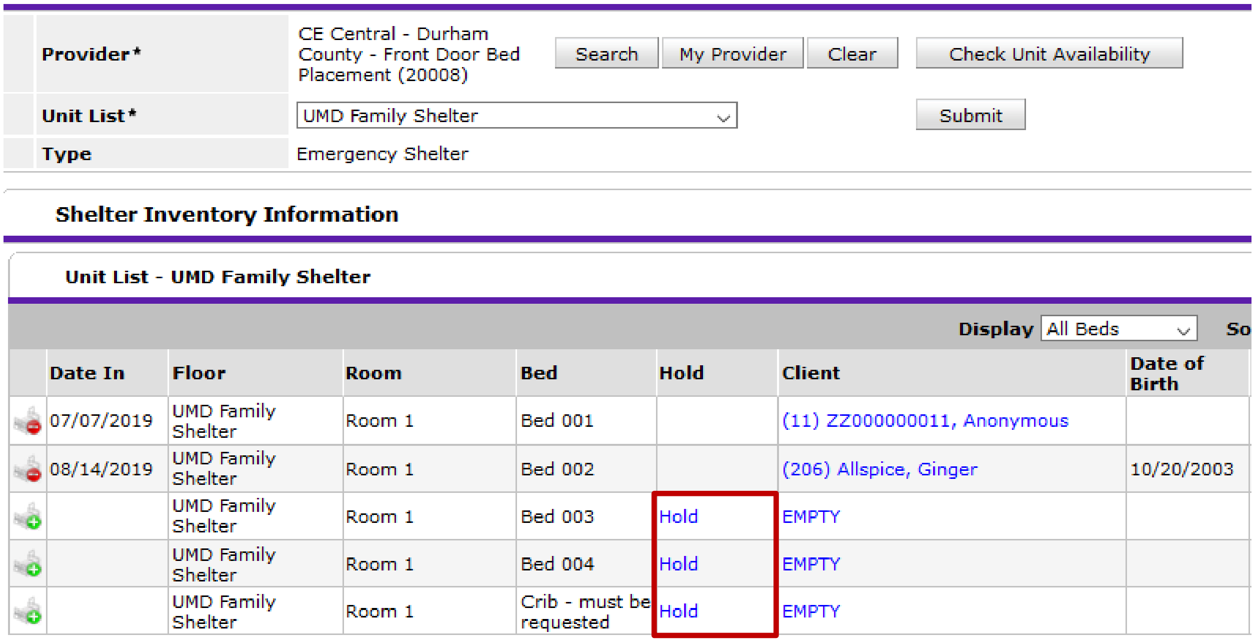
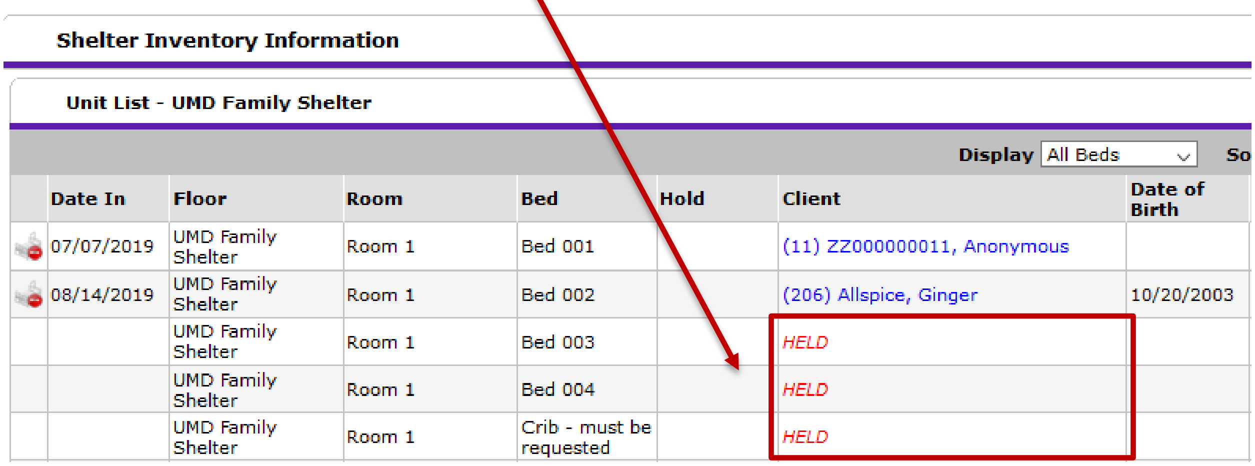
Hold Entire Room for Families

1. Family shelters place each family in a room so unused beds must be “held” to prevent another household from being placed into the same room.

2. Click each “Hold” to keep others from being assigned a bed in that room after all family members are checked into a bed.



3. Once held, the bed is unassignable.



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Fixing Accidental Bed Placements

1. If a household is accidentally assigned to the wrong bed, room, or shelter, then they must be removed from the bed list and re-entered properly.
    a. Sometimes households are accidentally assigned to *Overflow* beds or the wrong room.

i. Clients are placed in *Overflow* beds accidentally when two staff try to assign a bed at the same time. The *Overflow* is not a real bed and the client will need to be re-assigned.

	UMD Singles Shelter	Male Wing - White Flag	8	Hold	EMPTY				
	UMD Singles Shelter	Male Wing - White Flag	9	Hold	EMPTY				
08/05/2019			Overflow		(15) Star, Skip	07/09/2000	Male	96	No
			Overflow (New)		EMPTY				

ii. Clients can also be placed in beds they are ineligible for. The client Jamie Tucker (5) is in a household and is not female identifying. The client will need to be re-assigned an appropriate bed.

Unit List - UMD Singles Shelter

Display All Beds **Sort By** Floor Ascending

Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.
07/29/2019	UMD Singles Shelter	Female Wing	Bottom Bunk 001		(2) Rodriguez, Thursday	07/29/1988	Female		No
08/05/2019	UMD Singles Shelter	Female Wing	Bottom Bunk 002		(42) Butler, Friday				No
08/05/2019	UMD Singles Shelter	Female Wing	Bottom Bunk 003		(44) Joyner, Friday				No
08/05/2019	UMD Singles Shelter	Female Wing	Bottom Bunk 004		(5) Tucker, Jamie	07/09/1968	Male	96	No

2. Click on the red minus sign to remove the client from the incorrect bed.
   a. Select the *Reason for Check Out* with the response *Internal Shelter Movement.*

Unit Exit Data - (5) Tucker, Jamie

Date Out *	08 / 20 / 2019 5 : 41 : 16 PM
Unit Name / Number	Bunk Bed 06 - Top
Supplies Returned	Yes No

Apply Funds for Service

Household Members

No Household Members were originally associated.

Project Exit: Durham CE Bed Placement Date: 08/20/2019 05:41:16 PM

Reason for Check Out * Internal Shelter movement

Incidents For (5) Tucker, Jamie

Start Date	End Date	Incident	Incident Code	Provider	Ban	Site	Staff
			No matches.				

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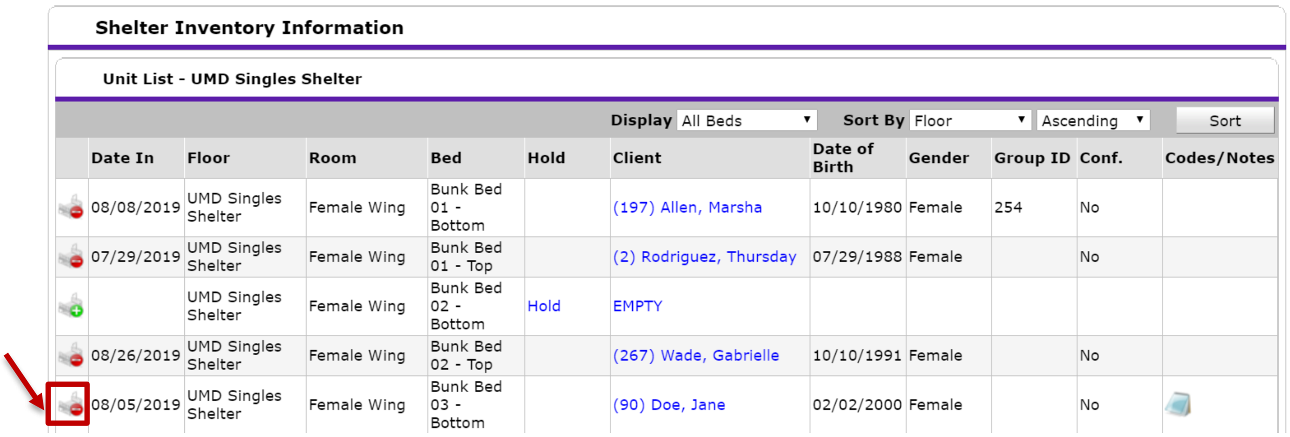
Check-Out Clients from Shelter Beds

When clients are no longer using a bed, check them out from the Master Inventory project via *ShelterPoint*.

1. Confirm your EDA mode is the *Bed Placement* project.
2. Follow steps 1-3 from the View Master Bed Inventory section above.
3. Check-out client/household out of bed/room by selecting the red minus sign next to the entry.



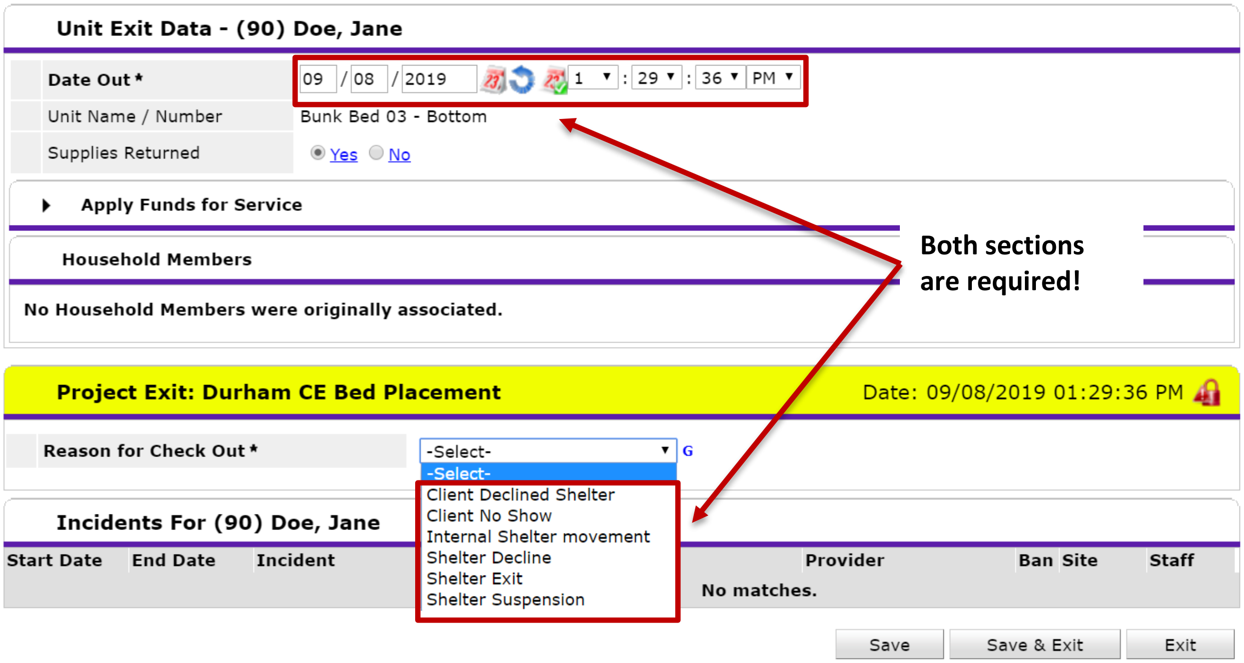
Shelter Inventory Information

Unit List - UMD Singles Shelter

Display All Beds **Sort By** Floor Ascending Sort

	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
	08/08/2019	UMD Singles Shelter	Female Wing	Bunk Bed 01 - Bottom		(197) Allen, Marsha	10/10/1980	Female	254	No	
	07/29/2019	UMD Singles Shelter	Female Wing	Bunk Bed 01 - Top		(2) Rodriguez, Thursday	07/29/1988	Female		No	
		UMD Singles Shelter	Female Wing	Bunk Bed 02 - Bottom	Hold	EMPTY					
	08/26/2019	UMD Singles Shelter	Female Wing	Bunk Bed 02 - Top		(267) Wade, Gabrielle	10/10/1991	Female		No	
	08/05/2019	UMD Singles Shelter	Female Wing	Bunk Bed 03 - Bottom		(90) Doe, Jane	02/02/2000	Female		No	

a. Confirm the *Date Out* is accurate.
b. If the client is part of a family household, check each member's box to include them in the exit process.
c. Complete the *Reason for Check Out* for the bed removal.
   i. *Client Declined Shelter* – The client or head of household contacted either the shelter or Entry Point to cancel the shelter stay.
   ii. *Client No Show* – The client or head of household did not contact the shelter or Entry Point and never presented for the shelter stay.
   iii. *Internal Shelter Movement* – Either the client accidentally was checked into the wrong bed and is being moved, or the client was moved by the shelter to a different room or bed.
   iv. *Shelter Declined* – The shelter declined the client referral but will accept a future referral.
   v. *Shelter Exit* – The client left the shelter after staying at least one night.
   vi. *Shelter Suspension* – The Shelter declined the referral due to a new or active suspension.
d. Click *Save & Exit.*



Vacancy Reports from shelters

Entry Point will receive vacancy information from shelters every morning around 8 am and during the day when additional beds open. Shelters will only report beds as vacant once the beds are turned over and ready for the next client. Shelters use a link on the Durham CE resources page to submit updates to Entry Point.

Entry Point should update the Bed Placement project for inventory after receiving vacancy information by checking clients out of the listed beds.

Comparing the Bed Placement Bedlist with Shelter Bedlist records

If you notice that the number of Vacancies in the form doesn't match what is in the Bed Placement project:

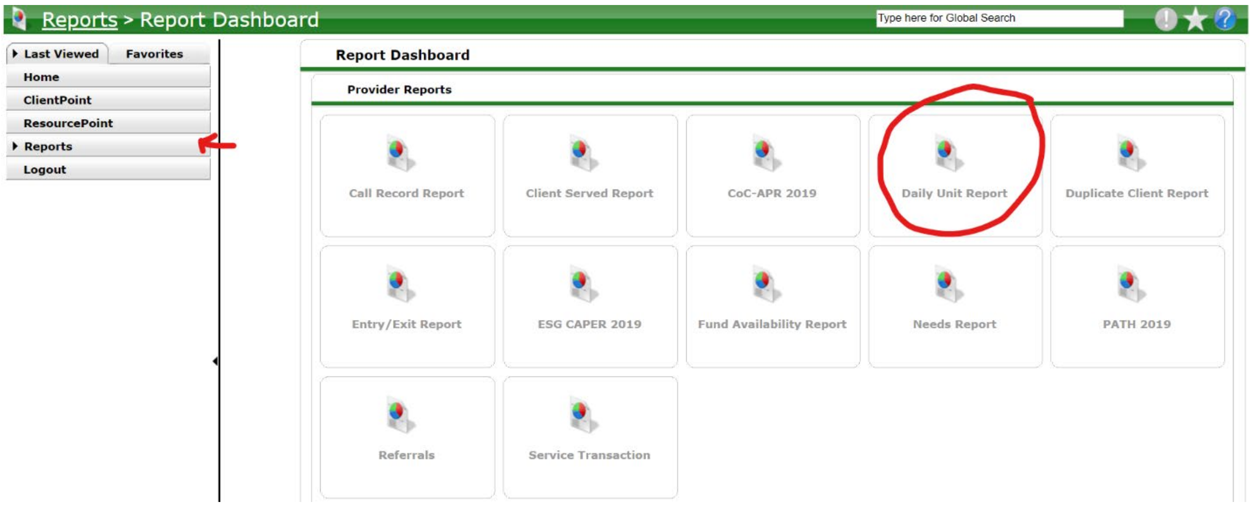
1. Check the Vacancy Forms.
   a. Review the past several days to see if an exit was accidentally missed.

2. Check the Shelter's Bedlist.
   a. Use the Ready Only (and share) HMIS Login.
      i. For UMD Shelters (Singles or Families), the username is "umdbedlist".
      ii. For FMF Shelter, the username is “fmfbedlist”
   b. The password will either need to be shared or rest every time a new staffer logs in. Use the Forgot Password option and an email will be sent to cecentral@voacarolinas.org.

c. Pull the Daily Unit Report for the shelter's bedlist.

i. Go to the Reports Dashboard on the left hand side

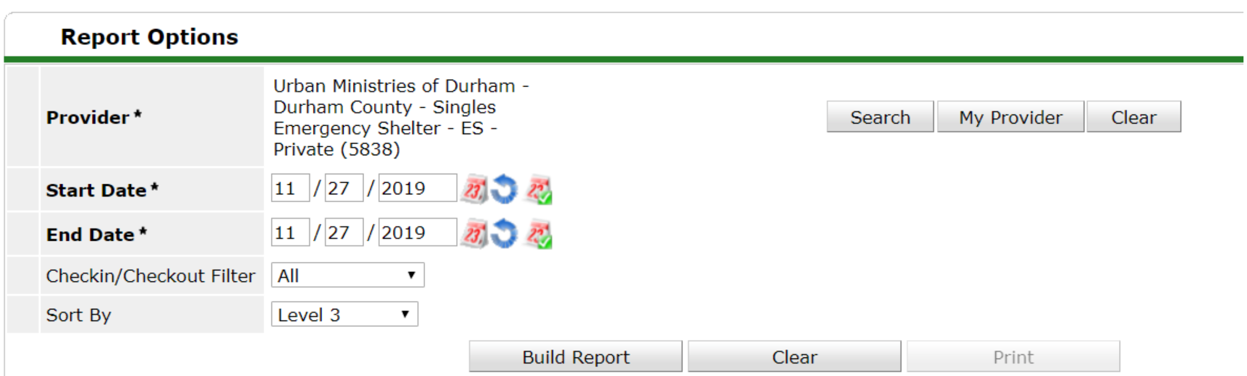
ii. Find the Daily Unit Report



iii. Complete the Prompts

1. Provider: UMD Singles
2. Start: today's date
3. End: today's date
4. Filter: All
5. Sort By: Level 3 (Bed Number)

iv. Click Build Report



3. Contact the shelter with specific questions, concerns or suggested corrections, copying CE Admins.

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Section: Shelter referrals

If diversion is not successful, and client is eligible for a shelter referral (see section 1 on shelter referral eligibility), refer household to a CE-managed shelter bed. CE-managed shelters beds are at Urban Ministries of Durham Families, Urban Ministries of Durham Singles, and Families Moving Forward – the Nest.

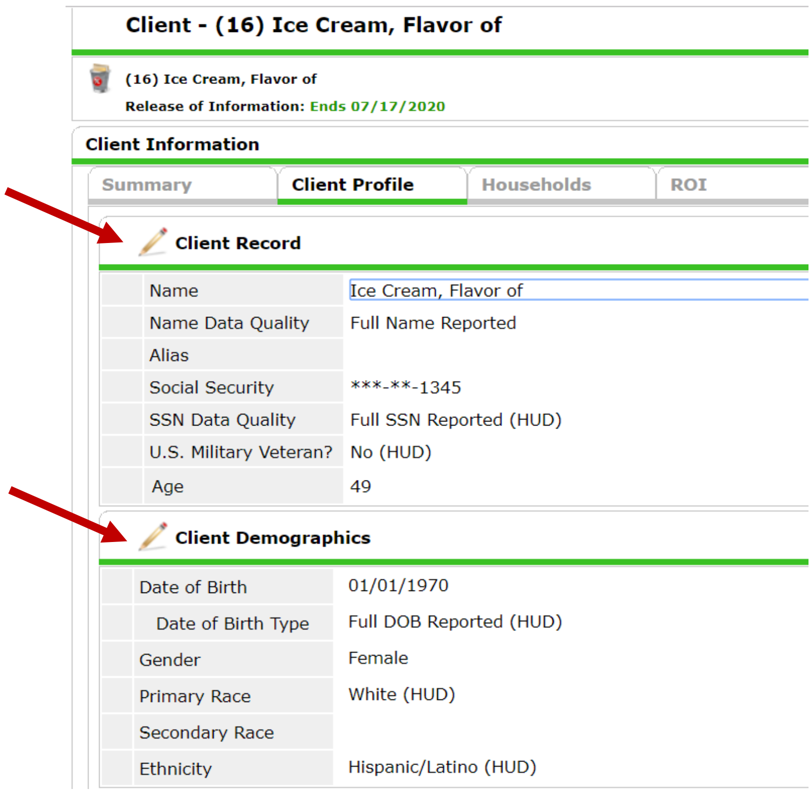
Sending referrals in HMIS

If a household is eligible for an available shelter bed and is the next person on the waitlist (if there is a wait list), Entry Point will send a referral in HMIS to the appropriate shelter. They will also check that household into the appropriate bed or unit in the Bed Placement project for inventory (see section above).

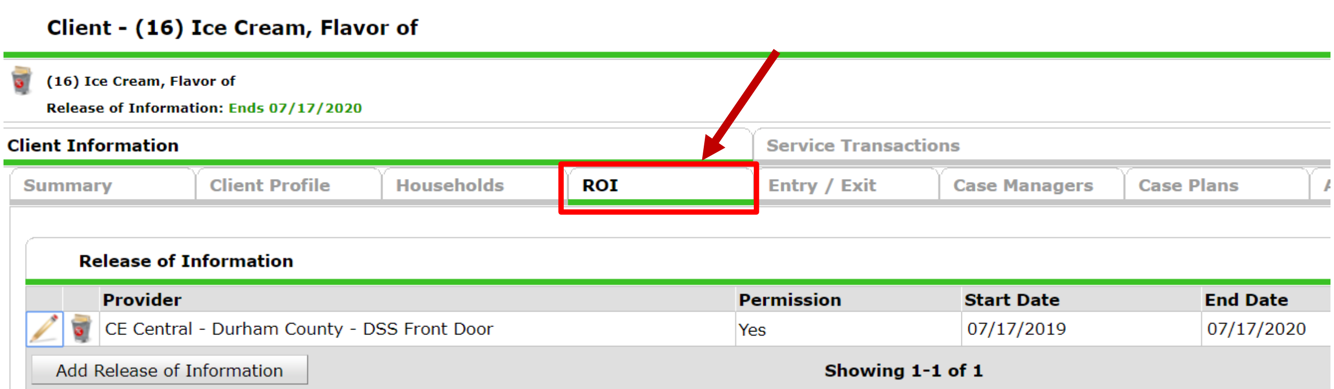
1. Change or confirm EDA mode is Entry Point Front Door project
2. Record Referral through service transaction for "Emergency Shelter" for all household members
    a. Set Need to *In Progress*
    b. Set Status to *Service Pending*
3. Record necessary notes under Need Details
    a. Use Note to identify the bed/room clients were placed into and any unique needs the client has identified
    b. Confirm intake details with household (families have an appointment for intake, singles have designated time at 5 pm).
    c. Save & Exit

Create Referral to Shelter

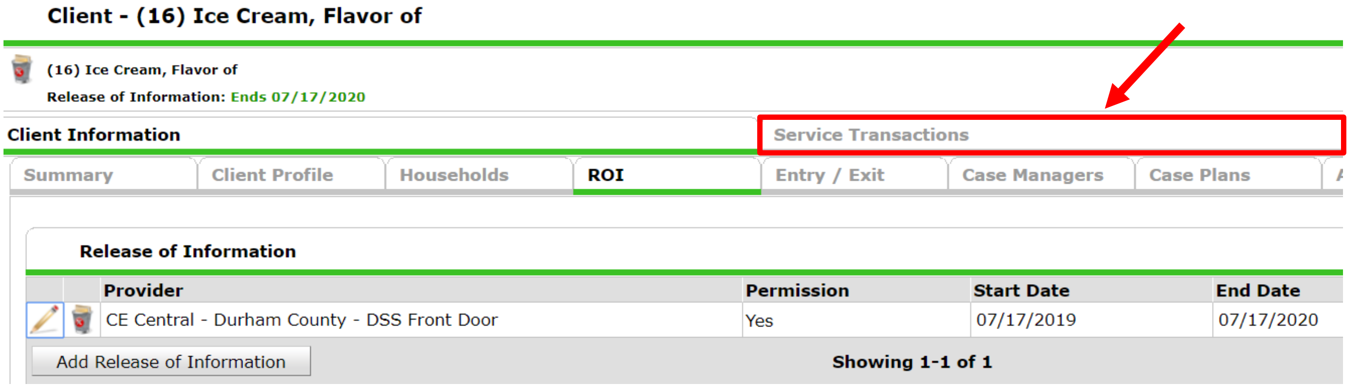
1. Change or confirm EDA mode is Entry Point Front Door project
2. Click on *ClientPoint*.
3. Search for prioritized client that will be referred to available shelter bed and navigate to client's profile.
4. Confirm information on *Client Profile* tab is correct.



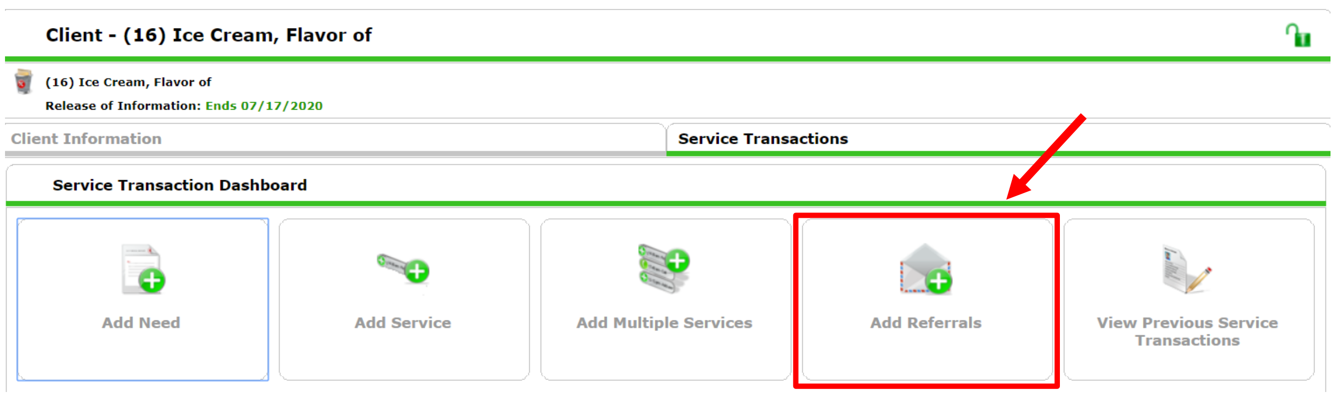
5. Check *ROI* tab to confirm appropriate electronic Release of Information.



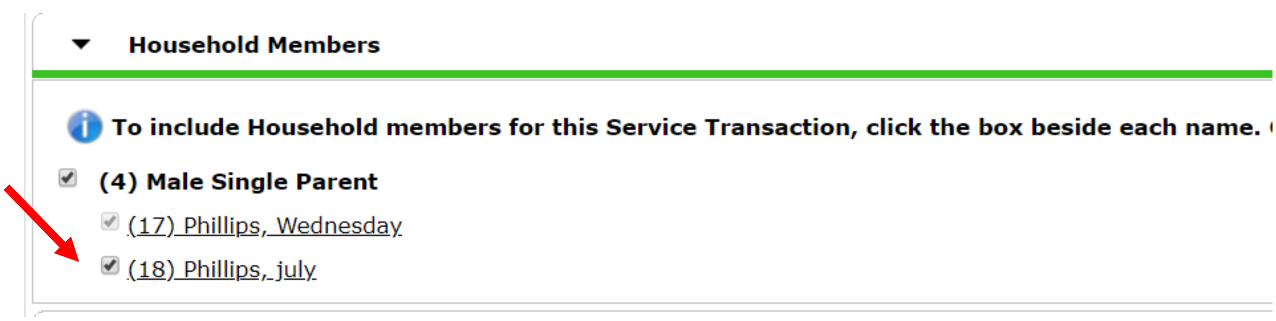
6. Click *Service Transactions* tab.



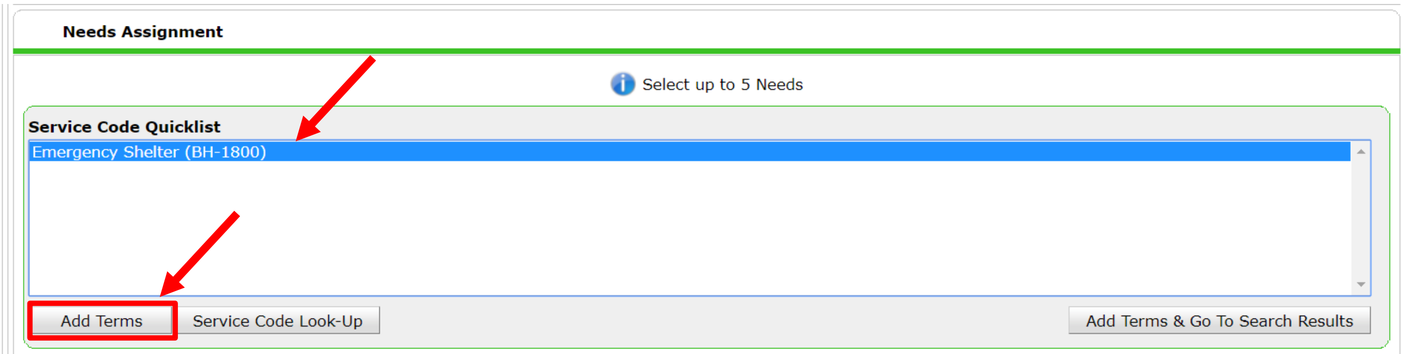
7. Click *Add Referrals.*



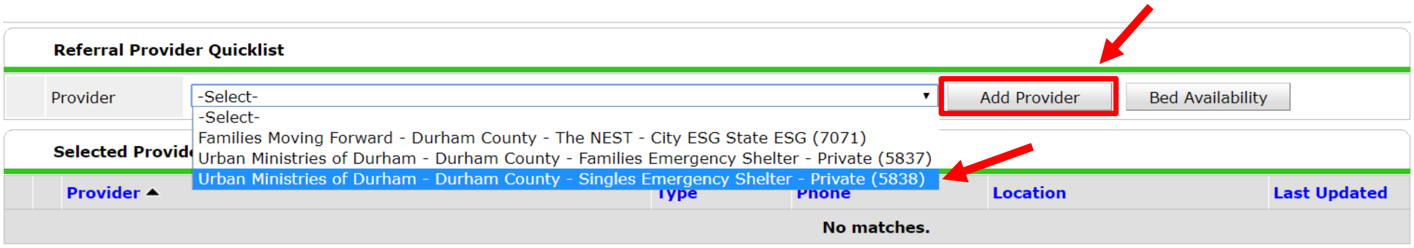
8. Include additional household members by checking the boxes next to their names if the client has a household.



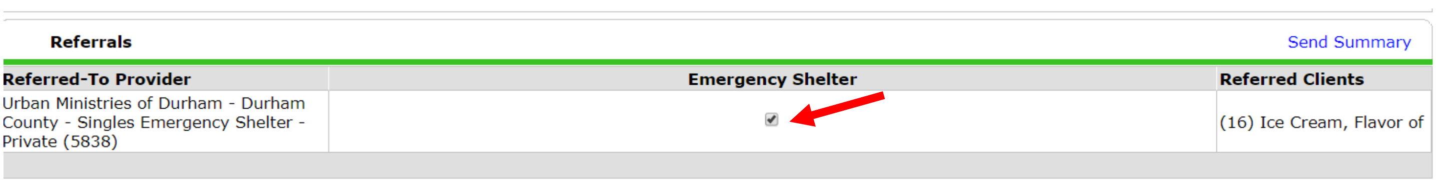
9. Select *Emergency Shelter* from the *Service Code Quicklist* and click *Add Terms.*



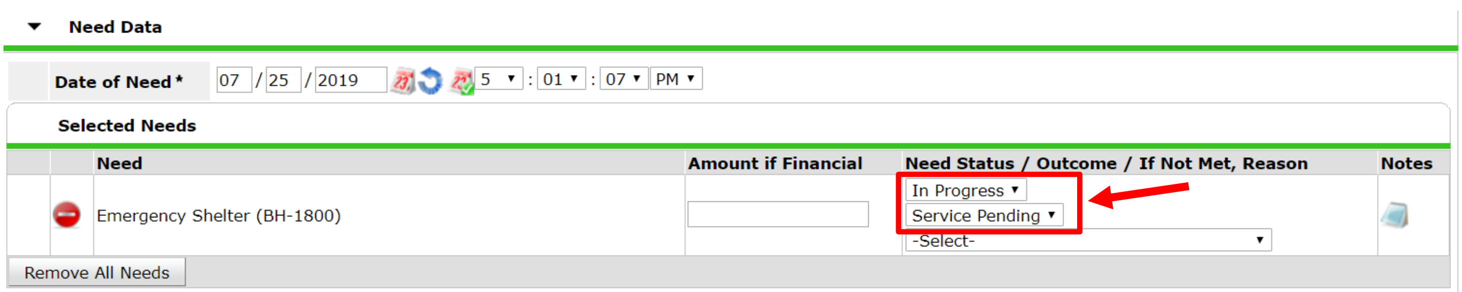
10. Select the appropriate shelter from the *Referral Provider Quicklist* and click *Add Provider.*



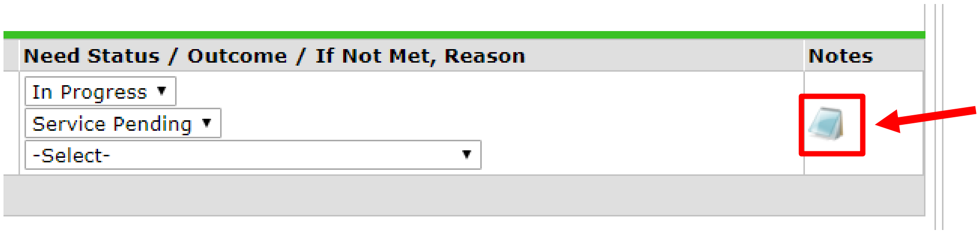
11. Ensure box is checked in *Referrals*.



12. Update *Need Status* to *In Progress* and *Outcome* to *Service Pending* in *Selected Needs.*

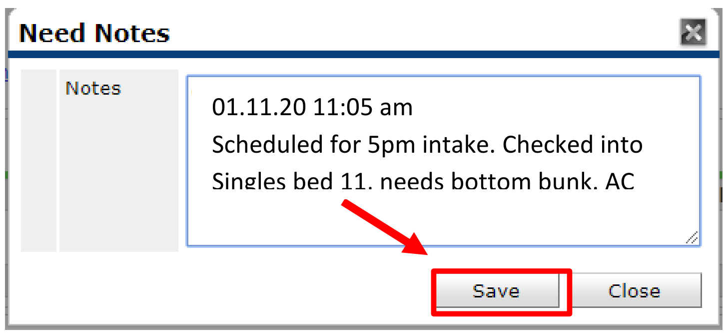


13. Click notepad to add a note.

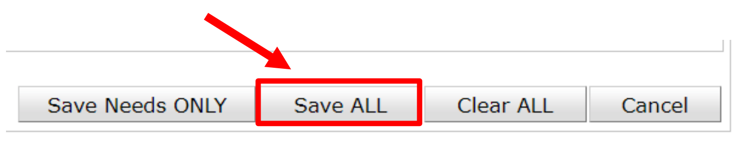


14. Notes about a client/household's referral will be added to the *Need Information Notes* section in Service Transactions. Add note with room/bed client was placed in and any unique needs then click *Save.* If this is for a family, please identify the Family Composition (number of adults and children).

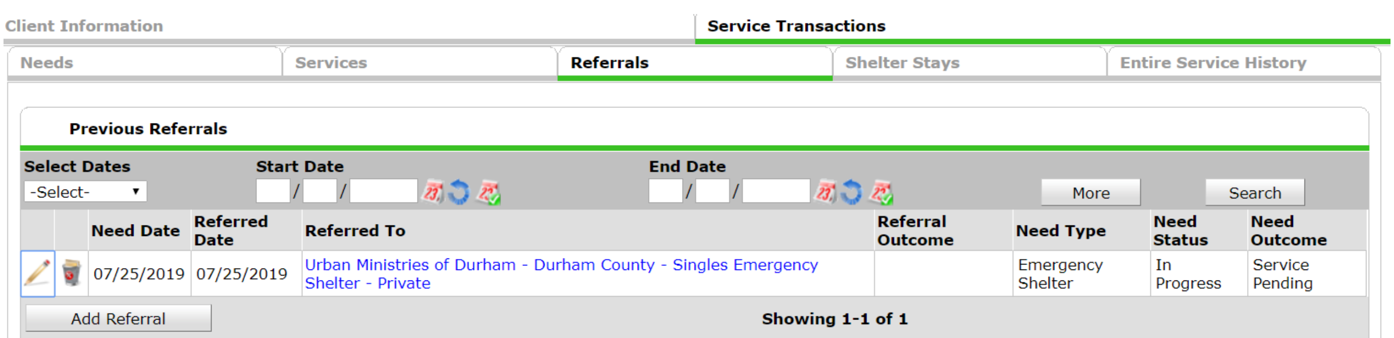
    a. The most recent note will go on top. The first row will be Date and Time. The second row will be the note itself and after the note, the staff's initials.



15. Click *Save All.*



16. Confirm referral appears.



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Referral Resolution

After a household is referred to shelter there are four possible outcomes of that referral:

1. A successful referral: household arrived for intake and is now in the shelter.

2. The shelter declined the referral.

3. The client declined the referral.

4. The client didn't show up for their appointment (no-show).

The shelters will communicate with Entry Point via email or phone and by indicating in HMIS the outcome of each referral.

The chart below outlines how to resolve each potential referral outcome.

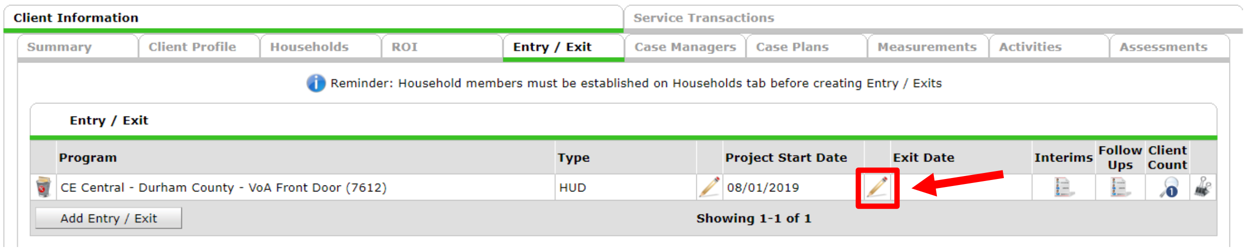
Outcome	Shelter Action	Entry Point Action	Entry Point HMIS Action	Client Action
Successful referral	Resolve referral in HMIS	See HMIS action	Exit client in HMIS	None
Shelter declines	Resolve referral in HMIS, Email Entry Point	Attempt to find more appropriate shelter option for client	Send another referral	Keep in contact with Entry Point
Client declines	Resolve referral in HMIS, attempt to find another shelter option, Email Entry Point	Follow up within 24 hours;	Mark decline in HMIS	Keep in contact with Entry Point
Client no-shows	Resolve referral in HMIS, Email Entry Point	Attempt to contact same day; If no contact, send new referral;	Mark attempts to contact in HMIS; exit if client has housing plan	Contact Entry Point by 10pm next day

Successful Referral

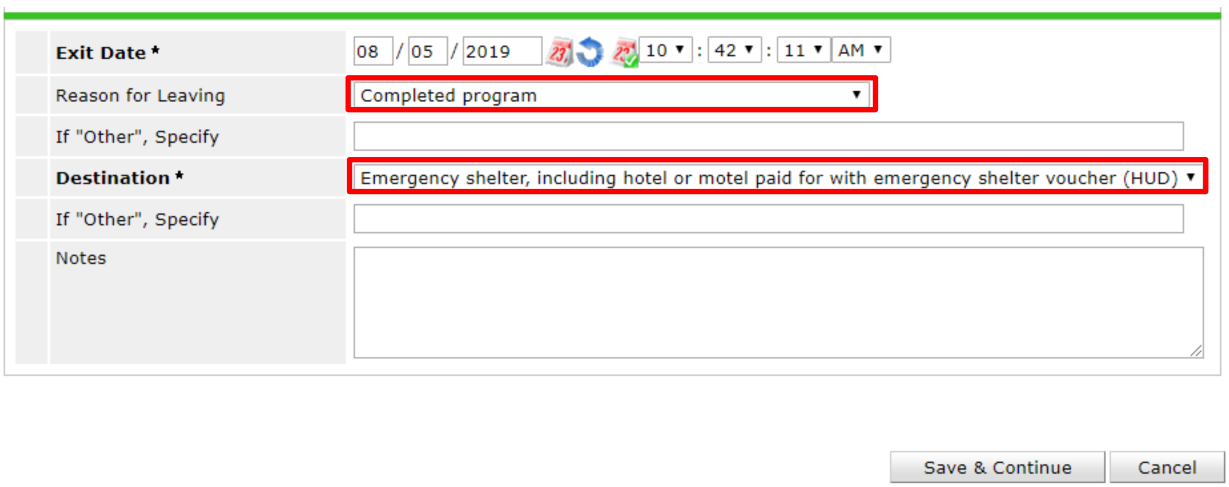
If a client successfully receives a shelter bed, the shelter will indicate on the referral in HMIS. Entry Point will exit the client from the Entry Point project in HMIS.

1. Once logged into HMIS, confirm *EDA* for the correct Front Door project.
2. Go to *ClientPoint* to search for the Head of Household.

3. Exit from Front Door project the next day, when/if referral is accepted by shelter and destination is confirmed.
4. Go to the *Entry/Exit* tab.
5. Find the blank area for *Exit Date* and click on the pencil.



6. Complete the *Edit Exit Data* section.
    a. If the client is in a household, check the boxes for all members who are being exited.
    b. Complete the *Reason for Leaving* and *Destination*.
        i. Change the *Reason for Leaving* to *Completed program.*
        ii. Record the *Destination* as *Emergency Shelter.*



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Shelter Declines

If a shelter declines the referral for a client to enter the shelter, the shelter will contact Entry Point and record the decline in the HMIS referral.

Entry Point will follow up with the client within 24 hours.

1. Change your *EDA* mode to the *Bed Placement* project.
2. Go to the *ShelterPoint* list.

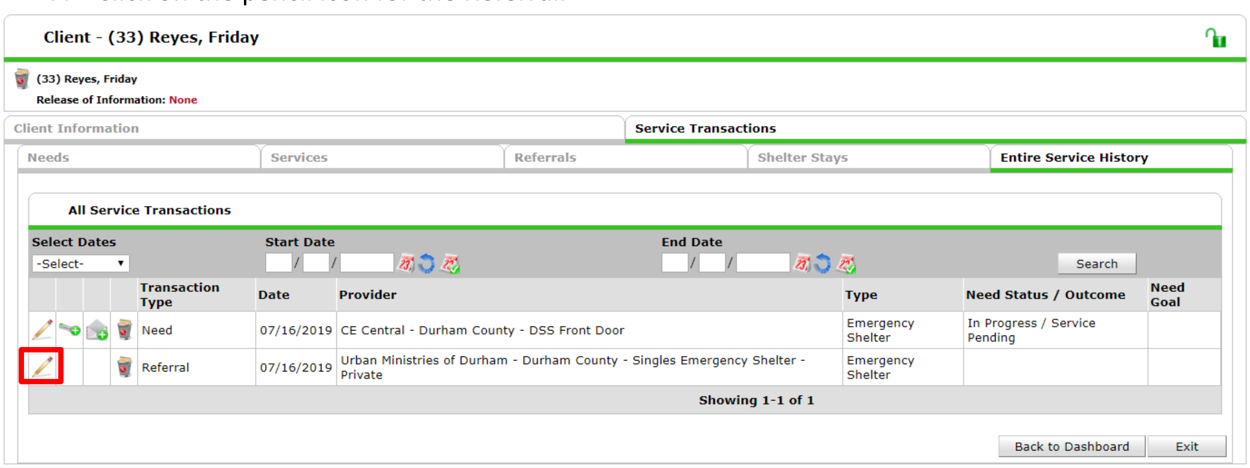
3. Check-out client/household out of bed/room.
    a. Complete the *Reason for Check Out* for the removal.
4. Change *EDA* mode to the Front Door project.
5. Use *ClientPoint* to navigate to the Head of Household's profile.
6. Go to the *Service Transaction* tab and select *View All Services*.
7. Click on the pencil icon for the Referral.
    a. For *Need*, record *Identified*.
    b. For *Outcome*, record *Not Met*.
    c. For *reason need not met*, record *Client was denied service.*
8. Click *Save ALL*.

Clients Declines/Cancels

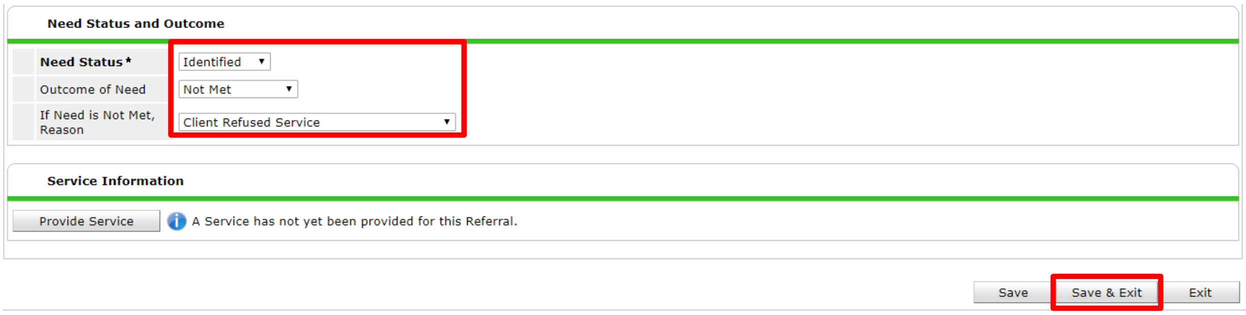
If a client arrives at the shelter but then declines to enter the shelter, the shelter will attempt to find the client another place to stay that night and record the cancellation appropriately in the HMIS referral.

Entry Point will follow up with the client within 24 hours.

1. Change your *EDA* mode to the *Bed Placement* project.
2. Go to the *ShelterPoint* list.
3. Check-out client/household out of bed/room.
    a. Complete the *Reason for Check Out* for the removal.
4. Change *EDA* mode to the Front Door project.
5. Use *ClientPoint* to navigate to the Head of Household's profile.
6. Go to the *Service Transaction* tab and select *View All Services*.
7. Click on the pencil icon for the Referral.



    a. For *Need*, record *Identified*.
    b. For *Outcome*, record *Not Met*.
    c. For *reason need not met*, record *Client Refused Service.*



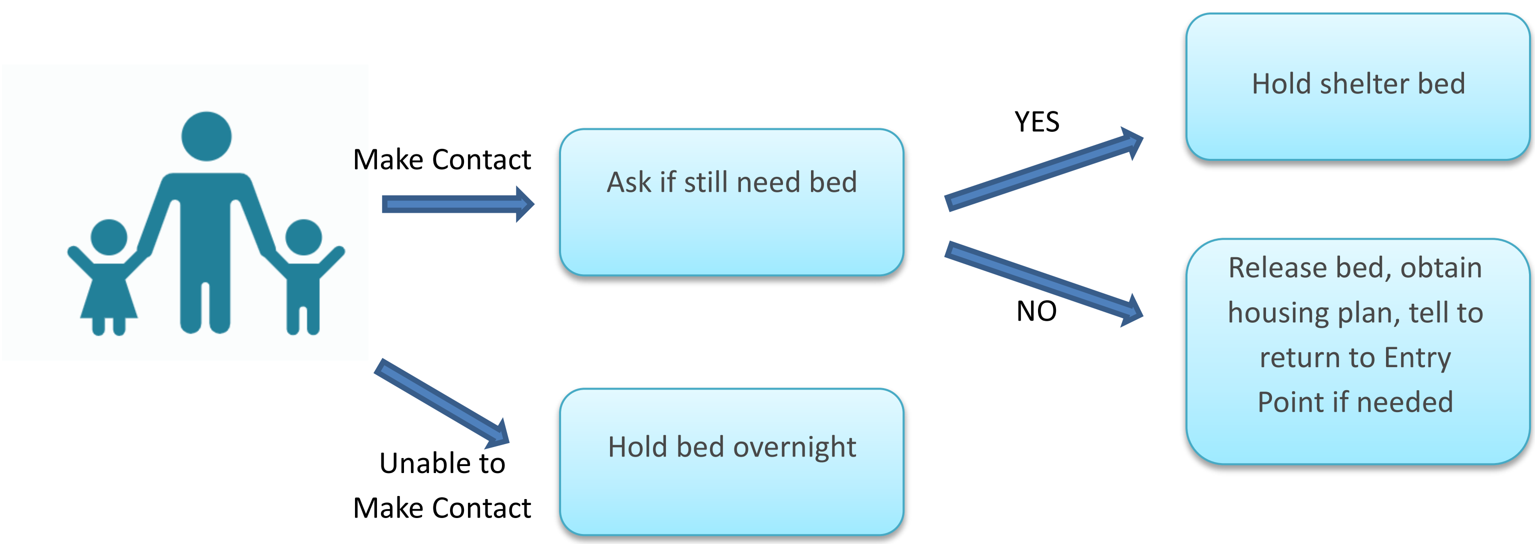
8. Client remains on waitlist. Do not exit the client from the Front Door project unless the client no longer requests a shelter referral.

Client No-Shows

If a client does not make their appointment at the shelter, Entry Point will try to contact that client.

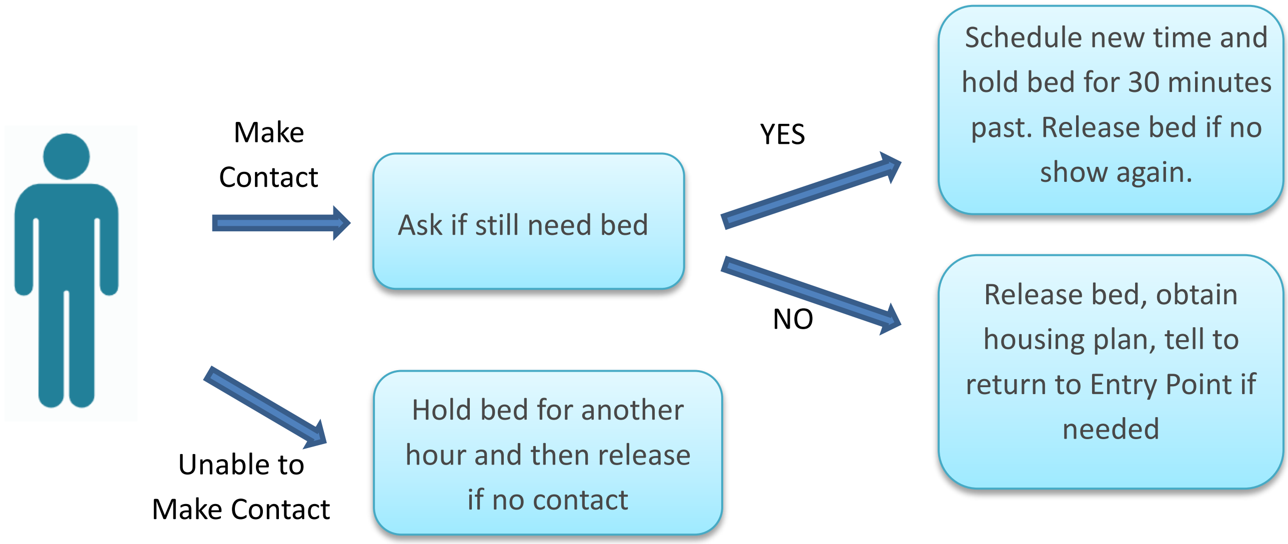
Entry Point will take slightly different actions for families and singles.

For family no-shows:



If a family no shows for intake 2 times in 3 months, then the bed will not be held overnight, but Entry Point does need to attempt to contact.

For single no-shows:



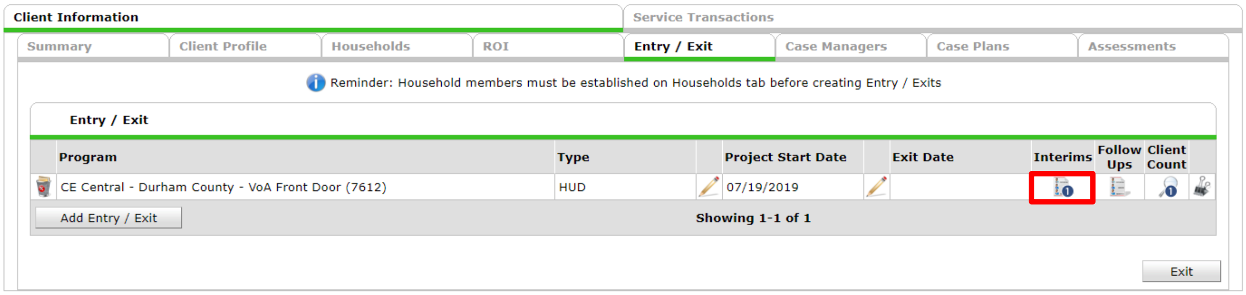
If a single adult no shows for intake 2 times in 3 months, Entry Point will attempt to make contact before immediately releasing the bed. If staff contact client after a no show, they will establish a deadline for arrival and release the bed after missing the deadline.

The following chart summarizes how to resolve no-shows on the wait list.

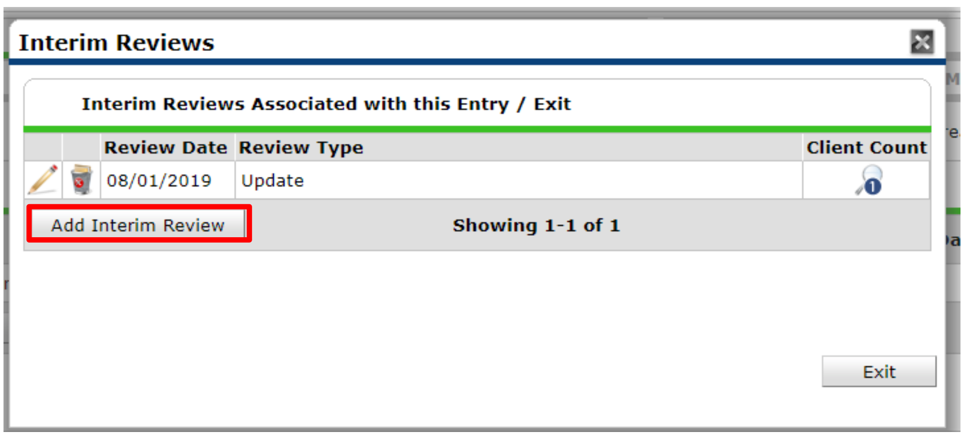
No show with a housing plan for the night	Remove from the waitlist
No show with no housing plan	Add/keep on waitlist Told to contact Entry Point the next day If no contact, remove from waitlist at 10 PM the day after no show
No show with no contact with Entry Point	Attempt to contact the following day Add/keep on waitlist If contact, refer to shelter If no contact, remove from waitlist at 10 PM the day after no show
Client is a no show 3 days in a row	Remove from waitlist Client will have to come back to Entry Point for a new intake

Record the contact attempts for Client No-Shows and Cancels in HMIS:

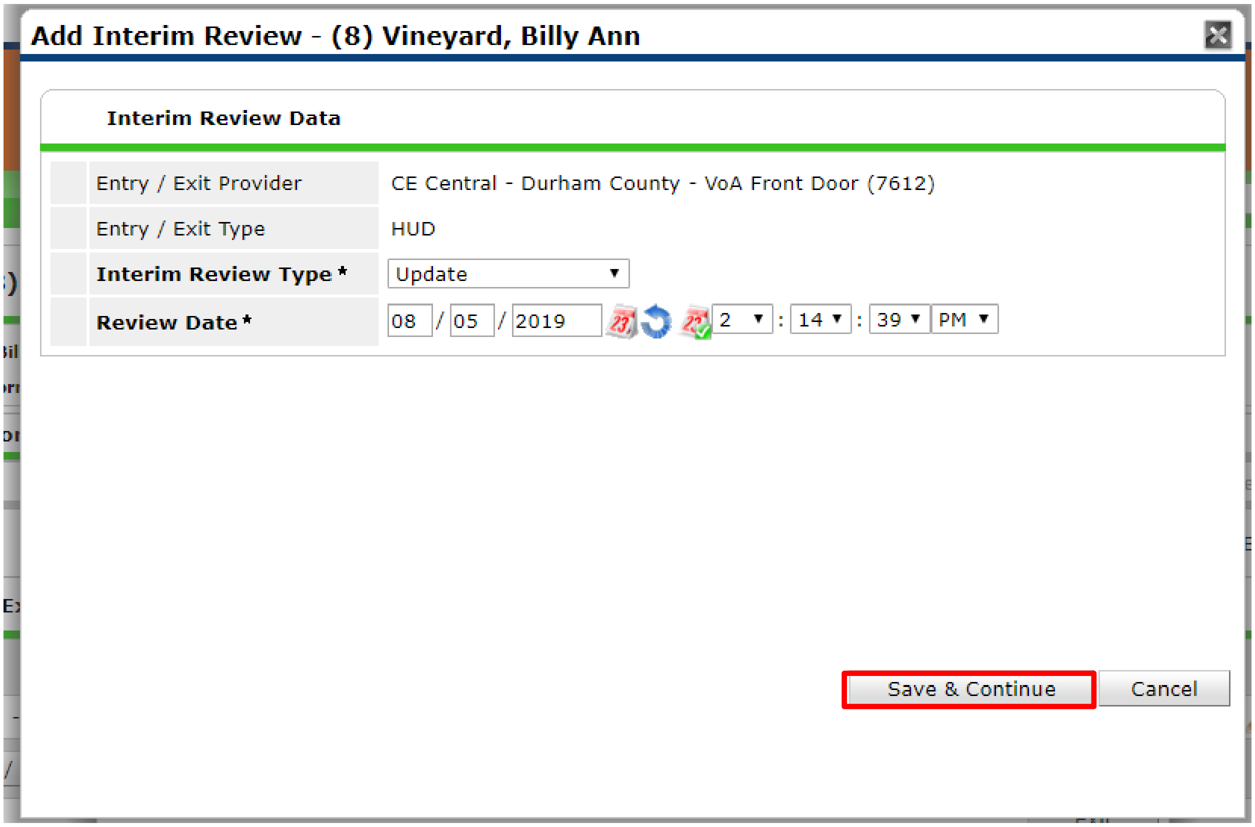
1. Once logged into HMIS, confirm *EDA* for the correct Front Door project.
2. Use *ClientPoint* to navigate to the *Head of Household*'s profile.
3. Go to the *Entry/Exit* tab and find the open Front Door entry.
   a. Click on the document icon under the *Interims* column.



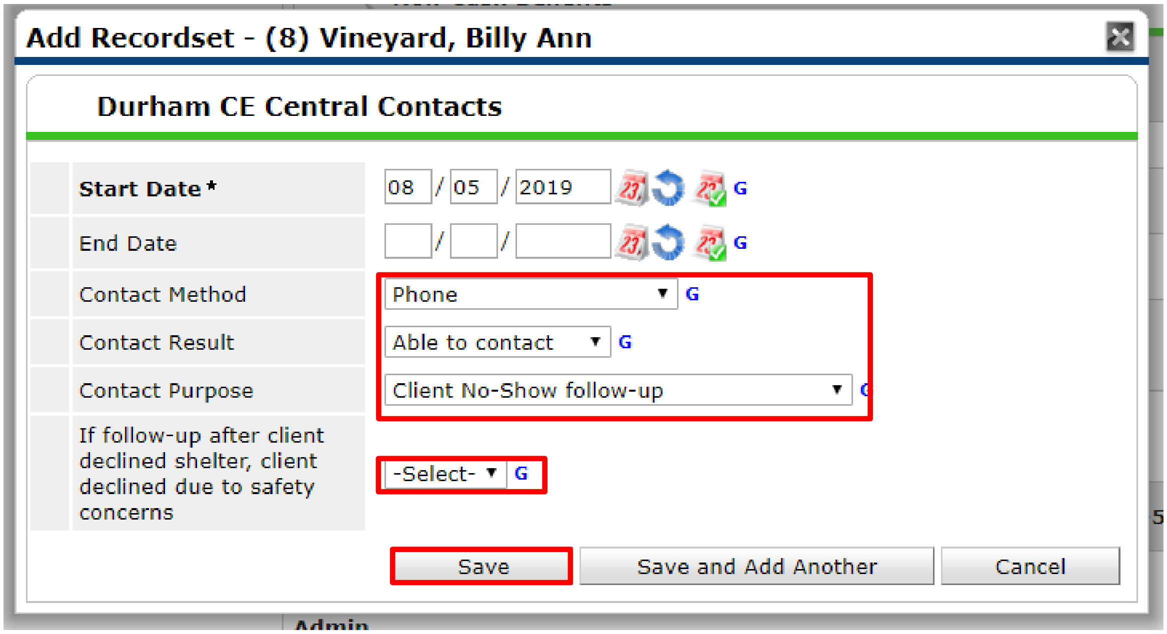
4. Click *Add New Interim Review*.



   a. Confirm the *Provider* is correct. If it is not, cancel the interim and change your *EDA* mode.
   b. Select *Update* for *Interim Review Type.*
   c. Confirm the *Review Date.*
   d. Click *Save & Continue.*



5. Review the responses to the *Project Interim: Durham CE Front Door* and update anything that has changed.
    a. Update the *Homeless History section if the client's housing situation has changed.*
    b. Update the *Client Resources* section if the *Income* or *Non-Cash Benefits* have changed.
6. Add the *Communication* to record the client follow-up by clicking *Add* in the communication sub-assessment.
    a. Confirm date for the contact as the *Start Date.*
    b. Complete the *Contact Method*, *Result*, and *Purpose.*
        i. For follow-up communication to *Client canceled, d*etermine from the client if their cancellation was related to safety concerns and select either *Yes* or *No* for the last question.
    c. Click *Save*.



7. If the client either no-showed or canceled because they realized that they do not want shelter services, consider completing a *VI-SPDAT* assessment on their *Interim.*
8. Click *Save & Exit*.
9. Do not exit the client from the Front Door project unless:
    a. The client no longer requests a shelter referral
    b. Within the last 72 hours a communication attempt has failed twice.
    c. Then go to Section: Project Exit

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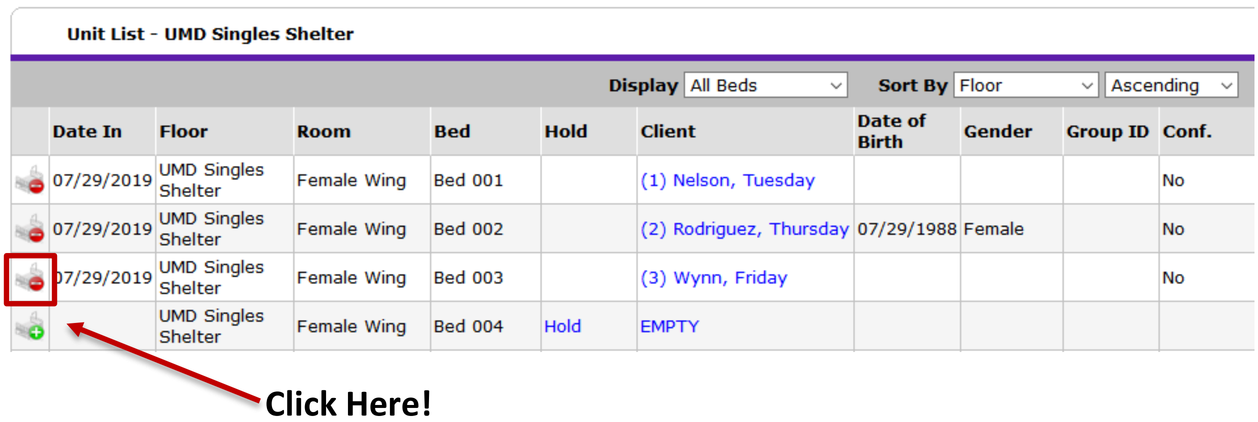
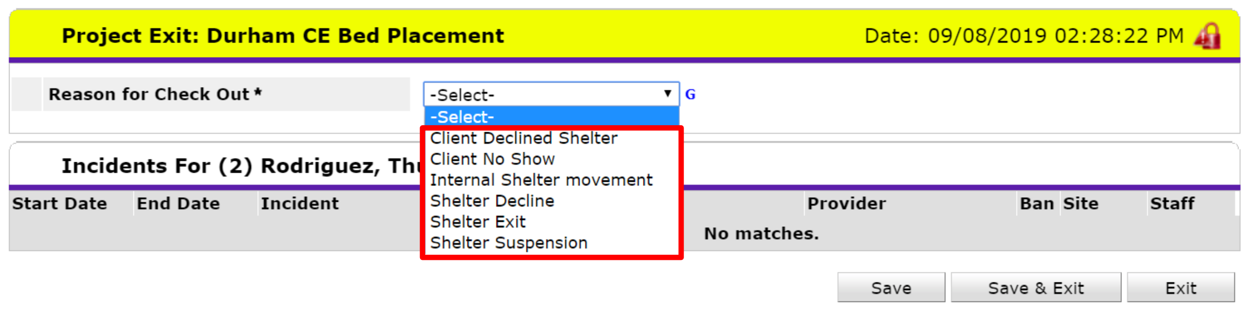
Checking Clients Out from the Bed Placement project

If a referral outcome is shelter declines, client declines, or no-show after more than one night, the client's bed is released, and the client is checked out of their bed in the Bed Placement project for inventory.

1. Return to the bed list when it's time to check the client out. Find the name and click the red minus sign.



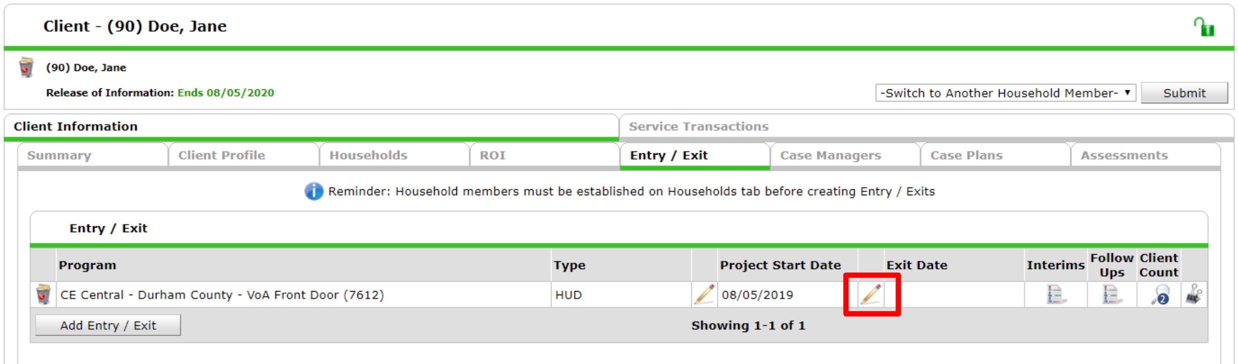
2. Use the drop-down menu to select the reason that the person is being removed from the bed list.
3. Select *Save & Exit*.



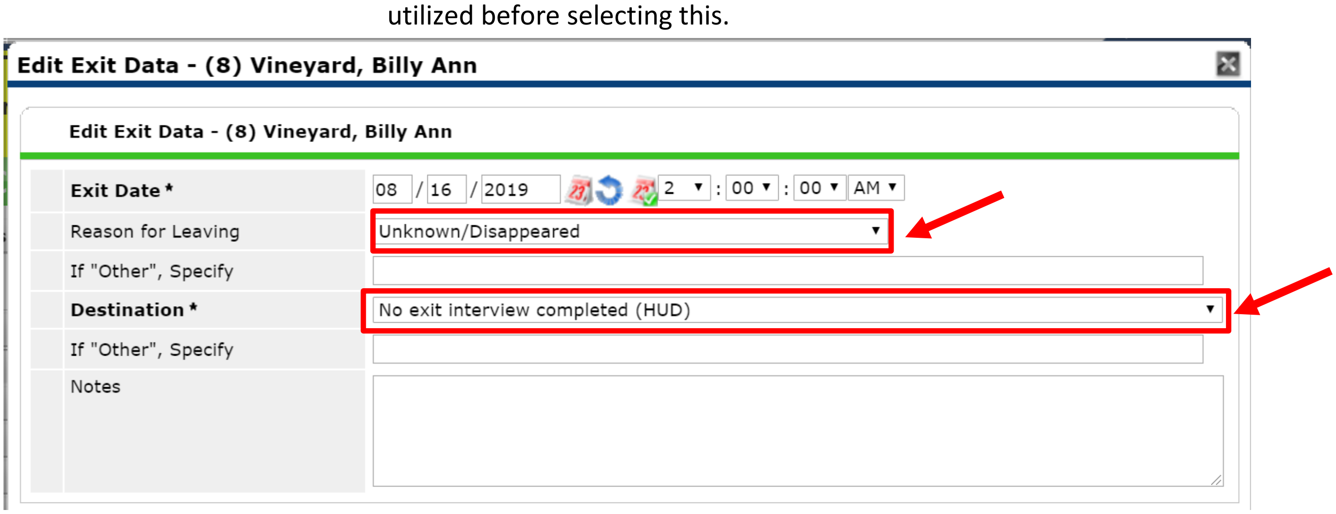
Removing clients from the Waitlist

If the client no longer wants shelter services, the client is not eligible for shelter services, shelter services are unavailable, or Entry Point loses contact with the client, staff may remove the client from the Waitlist.

1. Once logged into HMIS, confirm *EDA* for the correct Front Door project.
2. Use *ClientPoint* to navigate to the *Head of Household*'s profile.
3. Go to the *Entry/Exit* tab and find the open Front Door entry.
4. Find the blank area for *Exit Date* and click on the pencil.



5. Complete the *Edit Exit Data* section.
   a. If the client is in a household, check the boxes for all members who are being diverted.
   b. Complete the *Reason for Leaving* and *Destination*.
      i. Common *Reasons for Leaving*:
         1 Use *Unknown/Disappeared* if the client loses contact with Entry Point
         2 Use *Needs could not be met* if the client does not want shelter services anymore.
         3 Use *Does not or no longer qualifies for program* if eligibility and access to shelter is the obstacle.
      ii. Common *Destinations*:
         1 Use *Staying or living with friends, temporary* or the similar response for *family* if the client found another home to crash for the night or up to four months longer.
         2 Use *Hospital*, *Psychiatric hospital*, *Substance abuse treatment facility,* or *Long-term care facility* if the client is staying in a more institutional setting for medical needs.
         3 Use *No Exit Interview Completed* if the client's next location is not available from the client themselves, other HMIS entries, or other community staff. Make sure all *Client Contact Information* is being utilized before selecting this.

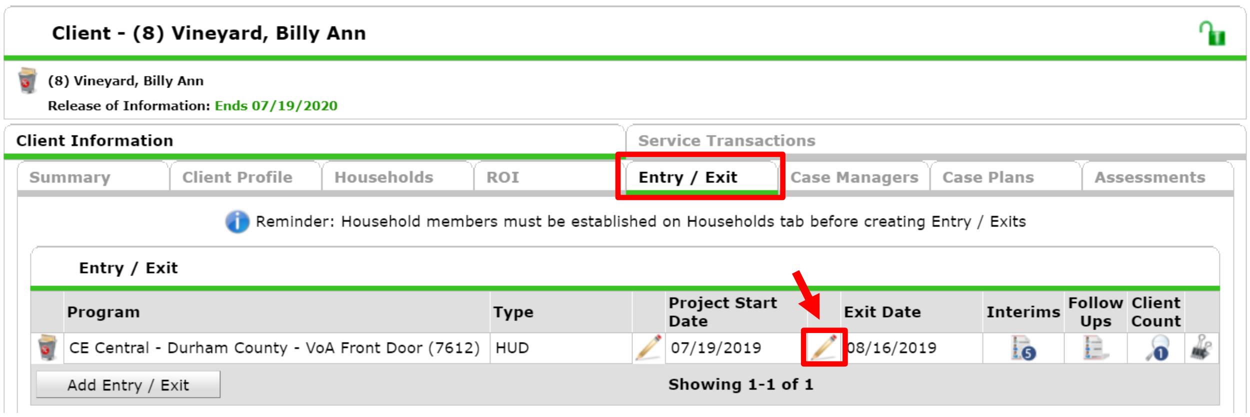


6. Click *Save & Continue* to update any information gathered about the client's context upon exiting.

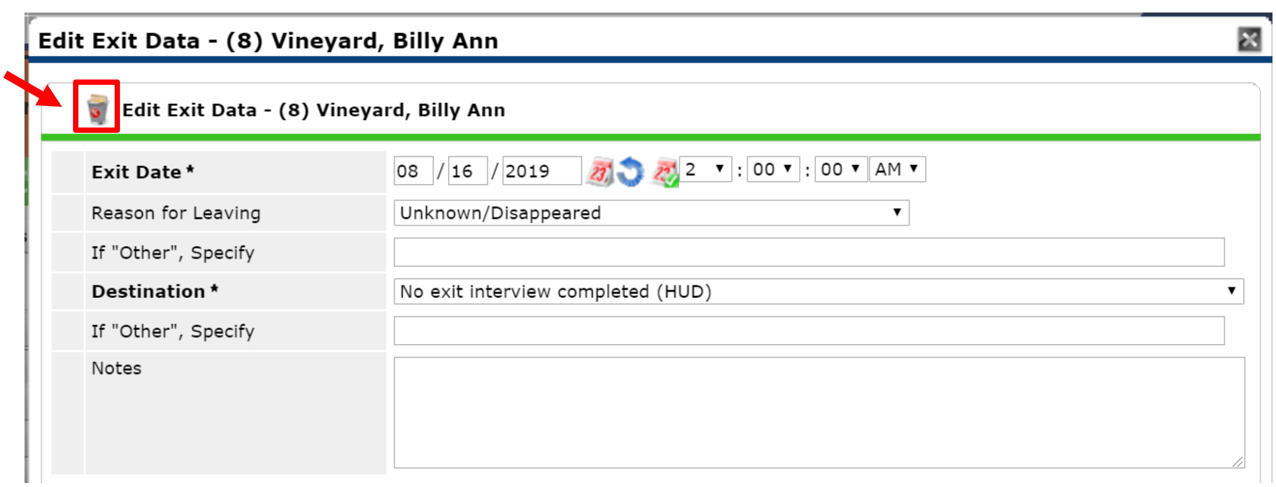
How to add clients back to the Waitlist

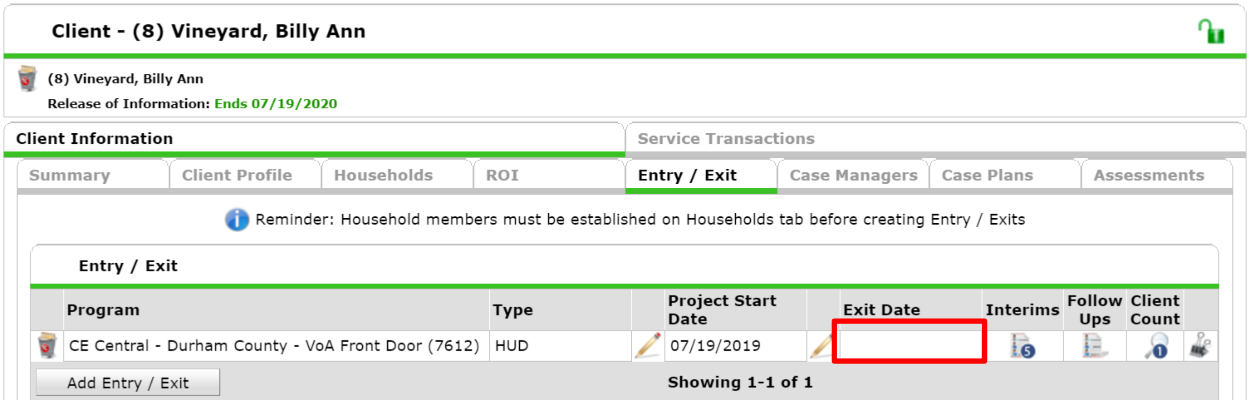
If a client loses contact with Entry Point and then reconnects, their most recent Front Door project entry may be re-opened. To lose contact means a client has at least two failed communication attempts in a 72 hours period. Clients can be added back to the waitlist if they communicate with Entry Point within 48 hours after their removal. Case by case discretion is allowed and expected.

1. If a client needs to be added back to the waitlist, go to *ClientPoint* to find the client.
2. Click on the client's *Entry/Exit* tab.
3. Click on the pencil icon next to the client's *Exit Date*.



   a. Next to the *Exit Data* title, click the trash bin icon to remove the exit.
      i. Caution: there is no undo option in HMIS. Any mistakenly deleted data will need to be re-entered.





1. The client is now on the waitlist for the original start date.

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Section: Unsheltered Clients

If a client refuses shelter or is known to Entry Point as someone who regularly refuses shelter, Entry Point should attempt to link the client to available outreach resources, such as:

Alliance Behavioral Health

Lincoln Health Center

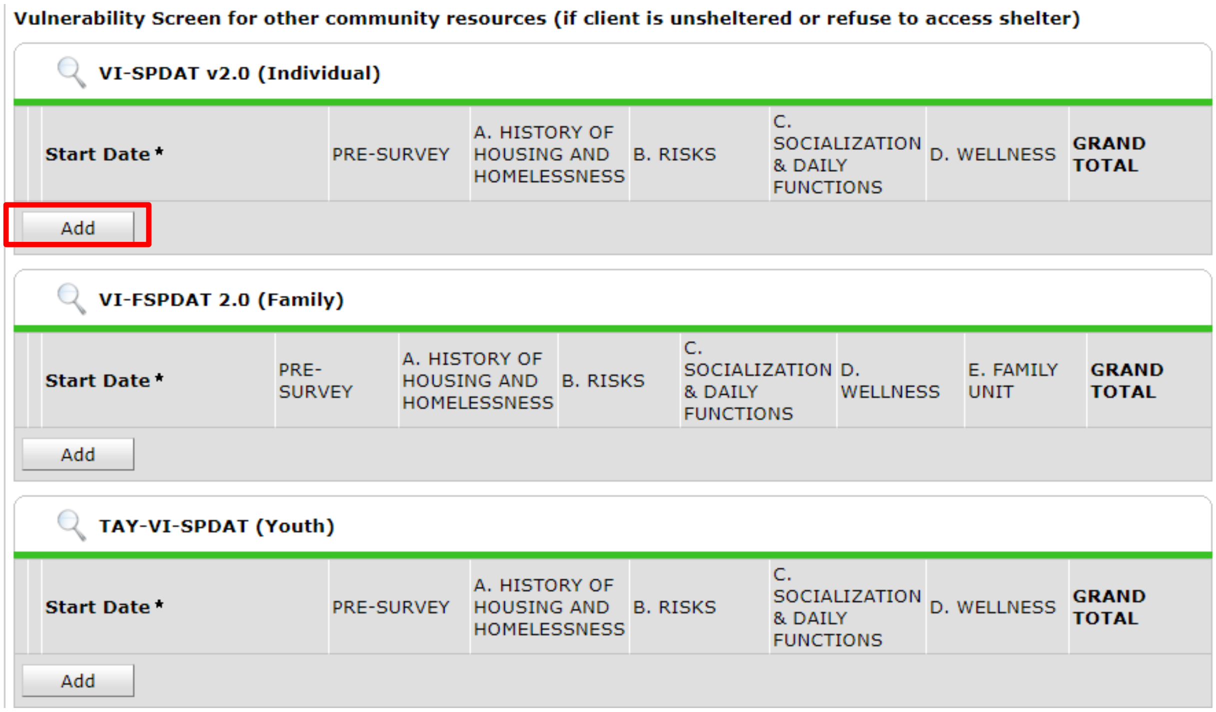
Homes for New Hope Street Outreach

Open Table Ministry

Entry Point should also attempt to conduct a VI-SPDAT, if one has not been already completed (or has not been completed recently) and should screen for SOAR eligibility.

1. Complete the appropriate version of the *VI-SPDAT* assessment for clients who are currently unsheltered or ineligible for emergency shelter in Durham.
    a. Select *Add* for the appropriate VI-SPDAT assessment. Select the most appropriate version.
        i. Use *VI-SPDAT (Individuals)* for adult clients presenting by themselves or in a group without children 17 or younger
        ii. Use *VI-FSPDAT (Family)* for the head of household in a group with children 17 or younger
        iii. Use *TAY-VI-SPDAT (Youth)* for adult clients age 18 to 24 years old
    b. Completing the appropriate VI-SDPAT assessment will help connect the client to permanent housing resources.

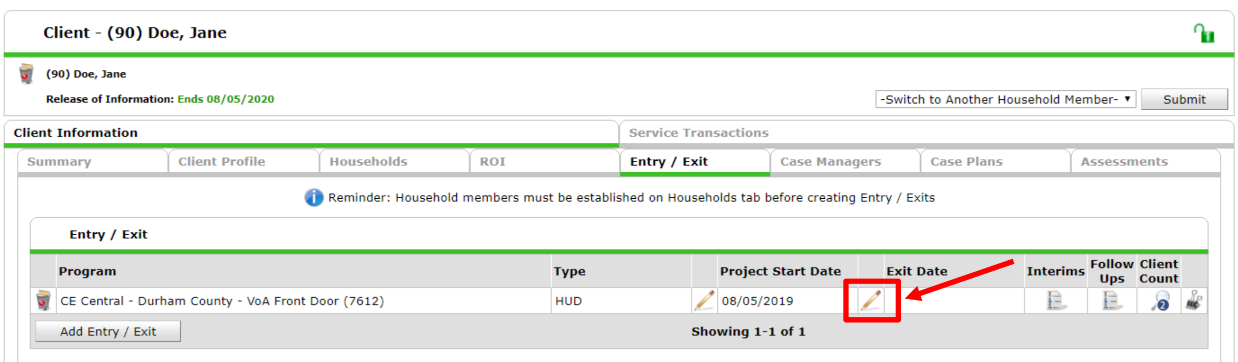
i. A Reminder: the recommendation that appears next to the grand total score does not guarantee any services. The permanent housing resource By Name List is prioritized and depends on availability.



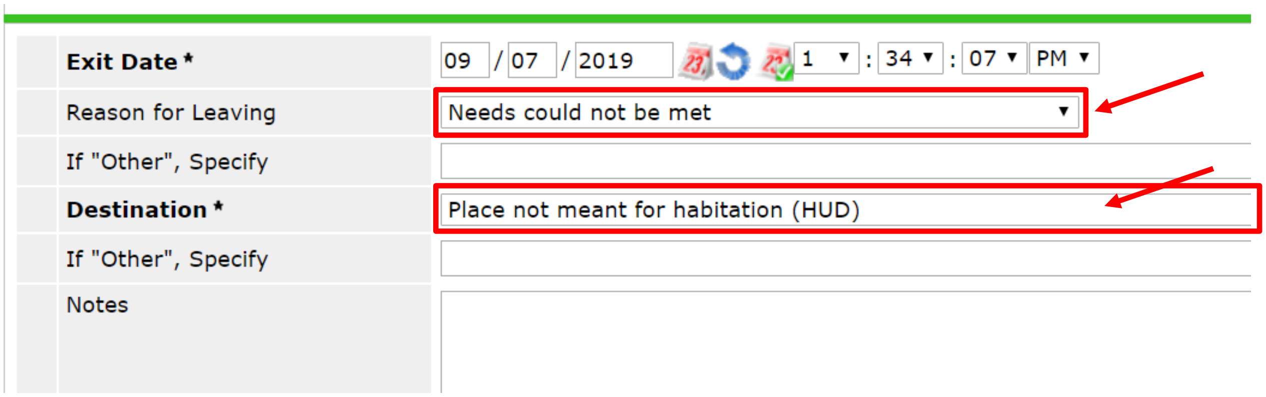
2. Complete the SOAR Eligibility screen and record the results under *SOAR eligible*.
   a. If the client already receives SSI or SSDI there is no need to complete the screen.
   b. Record *Yes* or *No* for the results.
   c. Go to the [SOAR Eligibility Screening Questionnaire] for the survey.

Entry Point should then exit the client in HMIS and choose “Place not meant for human habitation” as the exit destination.

3. Go to the *Entry/Exit* tab.
4. Find the blank area for *Exit Date* and click on the pencil.



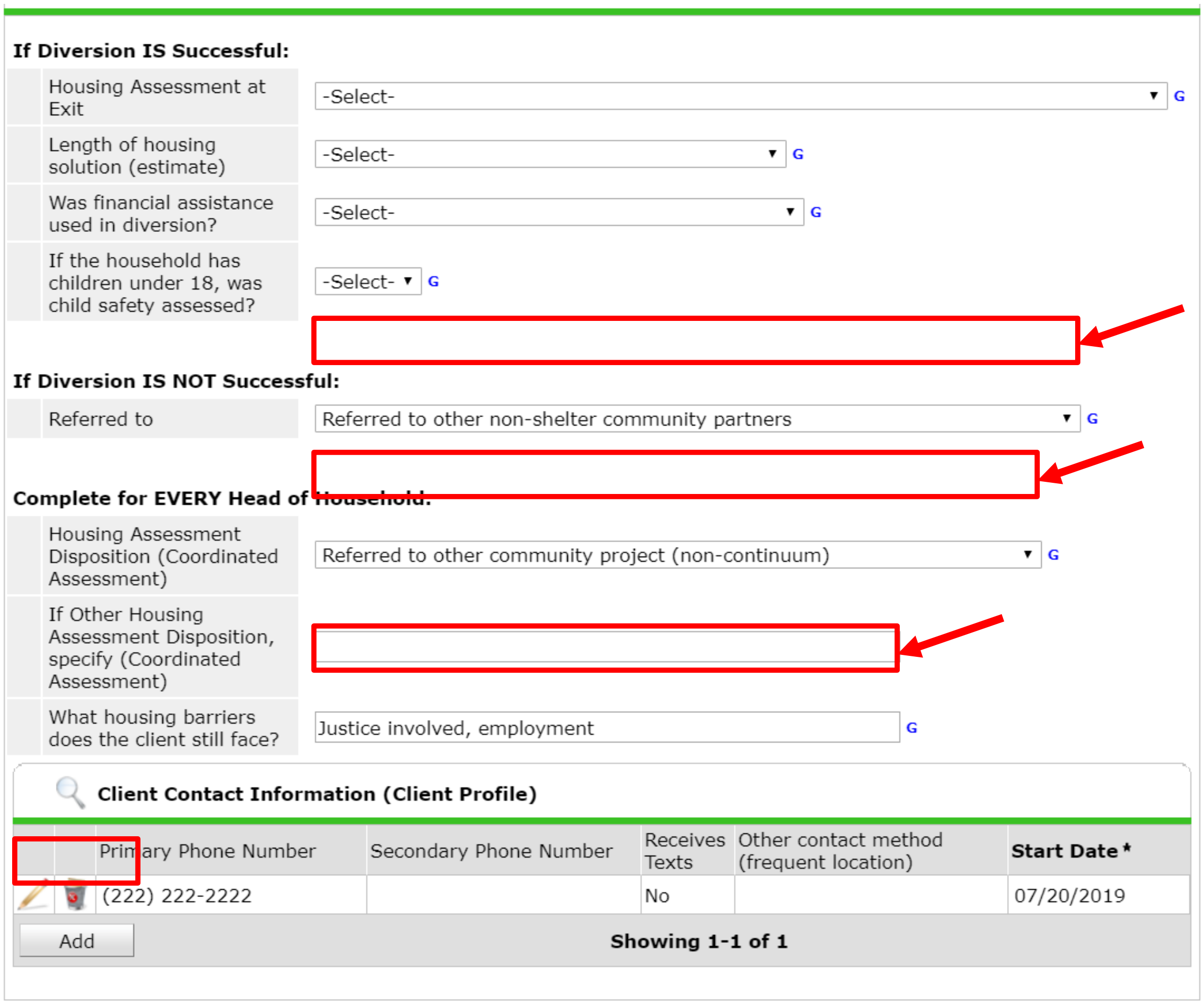
5. Complete the *Edit Exit Data* section.
   a. If the client is in a household, check the boxes for all members who are being diverted.
   b. Complete the *Reason for Leaving* and *Destination*.
      i. Use *Needs could not be met* for the *Reason for Leaving*.
      ii. Use *Place not meant for human habitation* for the unsheltered *Destination*.



   c. Select *Save & Continue* to finalize the client's data.

6. Complete the *Project Exit: Durham CE Front Door* assessment.
   a. Skip the *If Diversion is Successful* section.
   b. Under *If Diversion is Unsuccessful*, select the appropriate response to *Referred to:*
      i. Use *Referred to other non-shelter community partners* if referrals to outreach services was completed.
      ii. Use *No referrals available* if no referrals were completed (either by the choice of the client or for ineligibility).
   c. For the *Complete for EVERY Head of Household* section, select the appropriate responses.
      i. For *Housing Assessment Disposition*:
         1. Use *Referred to street outreach* if the client was successfully connected to a project for unsheltered clients.
         2. Use *Unable to refer/accept within continuum; ineligible for continuum projects* if the client is ineligible for shelter.
         3. Use *Referred to other community project (non-continuum)* if the client is connected to a non-homeless dedicated project. For example, if the client wishes to go to the Durham Rescue Mission, select this option.
         4. Use *Applicant declined referral/application* if the client does not want shelter referrals.
      ii. For *What housing barriers does the client still face*:
         1. This list does not need to be exhaustive. Identify obstacles to permanent housing that a diversion conversation has not solved.
   d. Update the *Client Contact Information* sub-assessment if any additional ways to reach the client are discovered.
   e. Click *Save & Exit*

If no referral to another community project was available or made, schedule time with the client to contact them within a week. Continue to the [Case Management Type B section](#) for further guidance.



Case Management Type B

Case Management Type B are the follow-up services required to connect unsheltered client who removed from the Shelter Waitlist with additional community services. These services continue until a connection to CoC housing services (such as Street Outreach) is completed.

These services should be used in specific circumstances, when a client is currently unsheltered (staying a place not meant for human habitation):

1. Refuses to *ever* be referred to and placed in a Shelter Bed.
2. Is ineligible for currently available Shelter Beds.

Complete Case Management Type B services in HMIS through the steps for scheduling and recording Follow-Up Assessments.

1. Schedule the next contact with the client
2. Add the appropriate staff as the Case Manager (who will follow-up?)
3. At the next engagement with the client, complete the Follow-Up Assessment

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Section: Medical Vulnerability Screen

People who would be at particular risk for mortality or significant health problems if they slept outside should be identified as medically vulnerable in HMIS. They receive priority for available shelter beds.

The following categories of households should be identified as medically vulnerable

- Households with children under the age of 5
- Households with members above the age of 60
- Households with people with disabilities (identified by receipt of SSI/SSDI or other documentation)
- Households with people receiving medical treatment requiring supplemental machinery/equipment or electricity such as oxygen, nebulizer, cpap, motorized wheelchair, access to refrigeration for insulin.
- Households with people receiving active current treatment that is debilitating such as dialysis, or radiation/chemotherapy.
- Households with a pregnant member of the household

Staff at Entry Point may also identify someone with another circumstance that is not listed above as medically vulnerable if it is documented by a clinician.

Section: Special Population Screens and Outside Resources

Entry Point should ask whether clients would like to receive referrals to additional resources and describe each resource below. If a client would like to be screened for additional resources and seems likely to be eligible, screen for resources as outlined below:

Veterans

Clients who screen positive for veteran status should be offered a referral to the Homeless Program at Durham Veterans Affairs. Should the offer of referral be accepted, the staff member should make a warm referral for the client via the VA National Call Center for Homeless Veterans: 1-877-4AID-VET (1-877-424-3838).

Durham Access Care Transitions

If someone needs a higher level of care than a traditional shelter can provide Entry Point should refer the client to Durham Access Care Transitions for medical respite. This referral is *in addition to a referral to traditional shelter.*

Referrals must be for:

- Single adults only, living in Durham
- With a recent emergency department visit
- Must be too sick to stay at a traditional shelter, but if they need to be at the hospital, you should call an ambulance or otherwise get them to a hospital.

To refer to medical respite, complete this form:
https://redcap.duke.edu/redcap/surveys/?s=LHMC3FN99F

If the referral is urgent call Julia Gamble as well at 919-452-8366.

HOPWA

Entry Point Staff should attempt to screen all clients for HOPWA eligibility by asking "If there was space available in a program that specifically assists people that live with HIV or AIDS, would that be of interest to you?" If a client is unfamiliar with HOPWA, it should be explained that HOPWA offers housing assistance specifically to people who have an HIV or AIDS diagnosis.

If a client answers yes to the screening question or self-discloses that they have an HIV/AIDS diagnosis, the client's HOPWA eligibility should be documented in HMIS.

Clients who screen positive for HOPWA eligibility should be either re-connected with the HOPWA case workers at DSS (for clients already connected) via warm referral or referred to HOPWA via warm referral.

Entry Point Staff should not ask directly whether someone has an HIV/AIDs diagnosis.

Behavioral health challenges

If Entry Point Staff Door Unit believes, due to observed behavior or self-disclosed information by the client, that a client may have behavioral health challenges, the staff member should offer to make a referral to or provide information for Alliance Behavioral Health's 24-Hour Access and Information Line 1 (800) 510-9132 for assessment and assistance.

SOAR Eligibility Screening Questionnaire

SOAR is a program that helps people experiencing homelessness or at risk of homelessness with disabilities successfully apply for disability benefits and Medicaid. Clients could receive either Supplemental Security Income (SSI), which is monthly income for people with disabilities without a significant work history, or Social Security Disability Income (SSDI) which is social security benefits for people with disabilities with a work history.

Use the screening below to see whether someone with a disability without income might be eligible to receive SOAR services. If they screen as eligible, mark in HMIS.

1. Have you ever received a monthly check for Social Security disability or SSI? If so, are you still receiving checks? If not, when did they stop?

2. Tell us about any mental or physical health problems that make it difficult for you to work.

3. Have you received any treatment for these conditions in the past (in the past year)?

4. Have you been able to earn more than $1,220* per month in the past 5yrs?

5. Are you currently applying for disability benefits?

6. Do you want to speak to someone about applying for benefits?

7. Are you interested in talking with someone about employment supports?

Assessor, please note any concerns you notice with this person in the following areas:

A. Understand, remember or apply information (ability to learn, understand instructions, provide explanation, problem solve, use reason and judgment in work related decisions)

B. Interact with others (ability to relate to and work with supervisors, co-workers and the public)

C. Concentrate, persist or maintain pace (ability to maintain focus, complete tasks, attend appointments, remain on task at a sustained pace)

D. Adapt or manage oneself (regulate emotions, control behavior, maintain well-being in the work setting, respond to demands, adapt to changes)

E. Physical activities (walking, standing, sitting, lifting, etc.)

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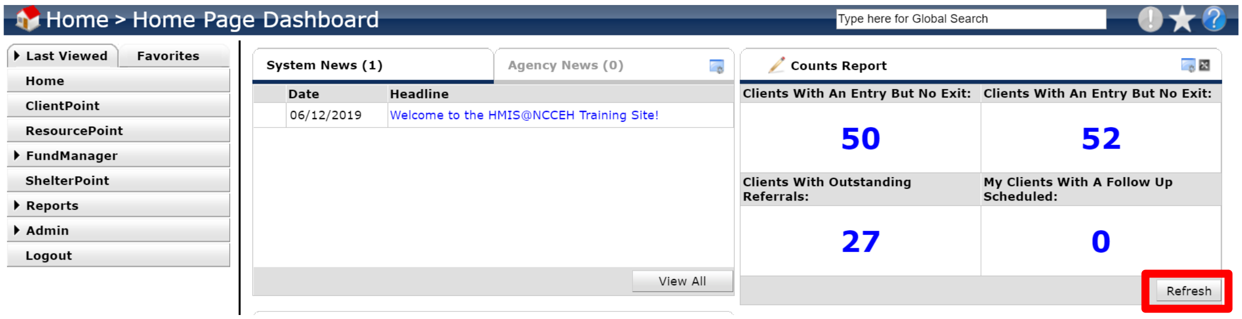
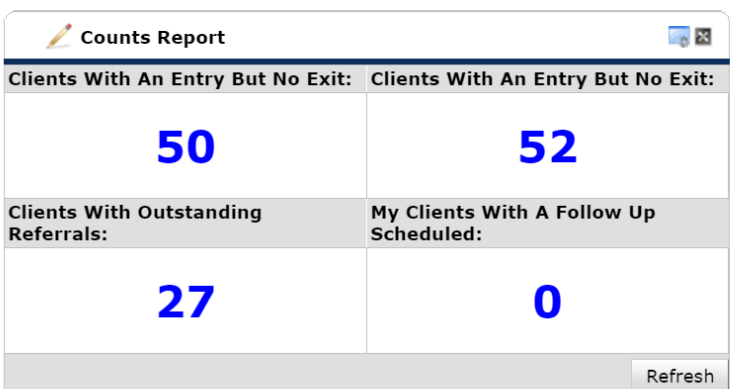
Waitlist, Referrals, and Case Management Type A tools with the Counts Dashlet Report

1. Login to HMIS and find your Counts Dashlet Report.



2. Click Refresh in the bottom right hand side.
   a. The top two quadrants are pre-set as *Clients With An Entry But No Exit* for Front Door projects.
      i. The top left is set to DSS
      ii. The top right is set to VoA
   b. The bottom left quadrant is pre-set to *Clients with Outstanding Referrals*. This number includes all client referrals from both Front Door projects.
   c. The bottom right quadrant is pre-set to *My Clients with A Follow Up Scheduled*. This number displays the temporarily diverted clients (Case Management Type A) with a follow-up planned for this week.



3. Click on the blue numbers to download the list of clients with key details like name and client ID.

Count Details

Clients With Outstanding Referrals

Client ID	Last Name	First Name	Middle Name	Suffix	Soc Sec No	Alias	Date of Birth	Gender	Number Of
197	Allen	Marsha			***-**-9999			Female	1
198	Allen	Mona			***-**-7799				1
109	Bear	Smokey	The		***-**-2222			Male	2
117	Bear	Yogi			***-**-2343			Male	2
284	Bloom	Fred			***-**-4040			Male	1
294	Bruin	Azizi			***-**-			Male	1
293	Bruin	Kamari			***-**-			Male	1
291	Bruin	Scar			***-**-2342			Male	1
292	Bruin	Shenzi			***-**-			Male	1
167	Fernandez	Carlos			***-**-9999			Male	1
152	Fernandez	Claudia			***-**-8888			Female	1
274	Fish	Azizi			***-**-			Male	2
273	Fish	Kamari			***-**-			Male	2
269	Fish	Scar			***-**-2342			Male	1
271	Fish	Shenzi			***-**-			Male	1

Download Full Report

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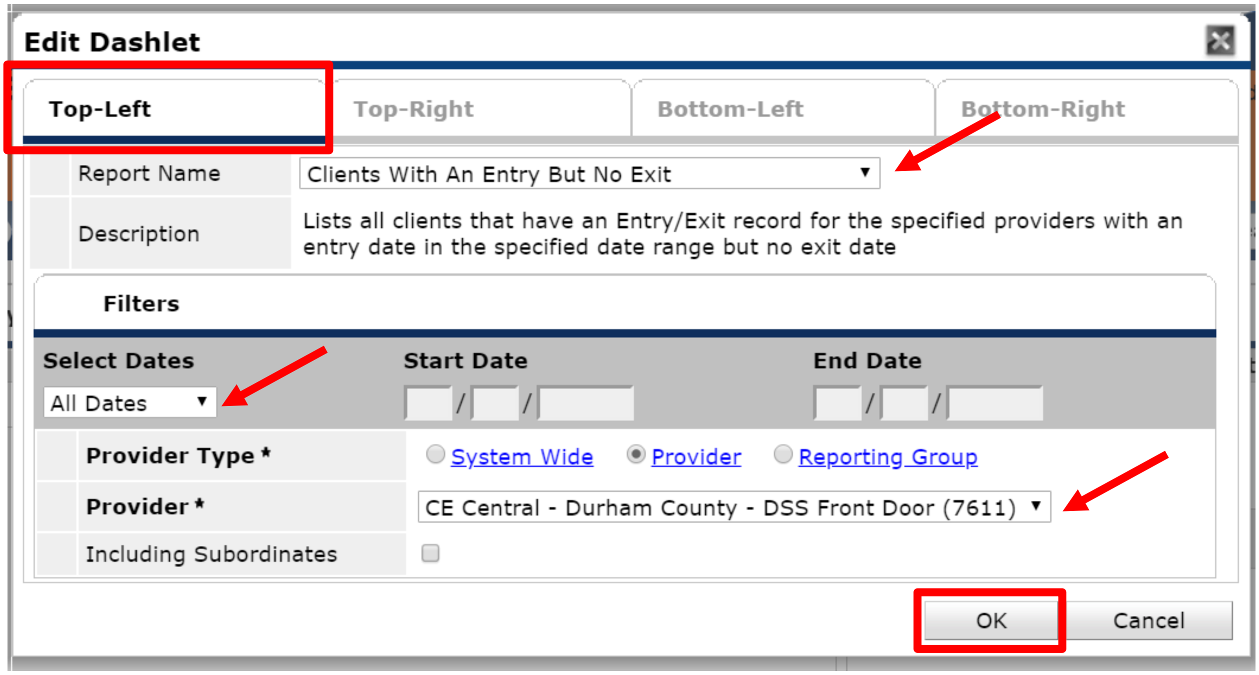
First Previous Next Last

4. To edit the Dashlet Reports, click on the pencil icon next to *Counts Report*.
    a. Then select the tab with the quadrant you wish to edit.
    b. A limited selection of measurements are available.
    c. Dates and projects can be specified for most reports.
    d. After edits, press *OK*.



Daily Waitlist Management

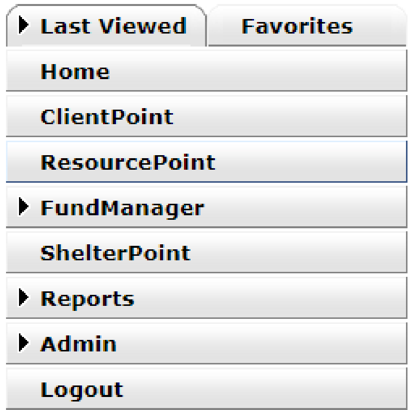
At the beginning of each shift (if there are shelter bed vacancies), and whenever new vacancies are reported, Entry Point should first attempt to fill all vacancies from the shelter bed waitlist. Entry Point staff will download a report to find who is next on the waitlist for shelter bed placement.

Pull the Durham CE Waitlist report from *ReportWriter*

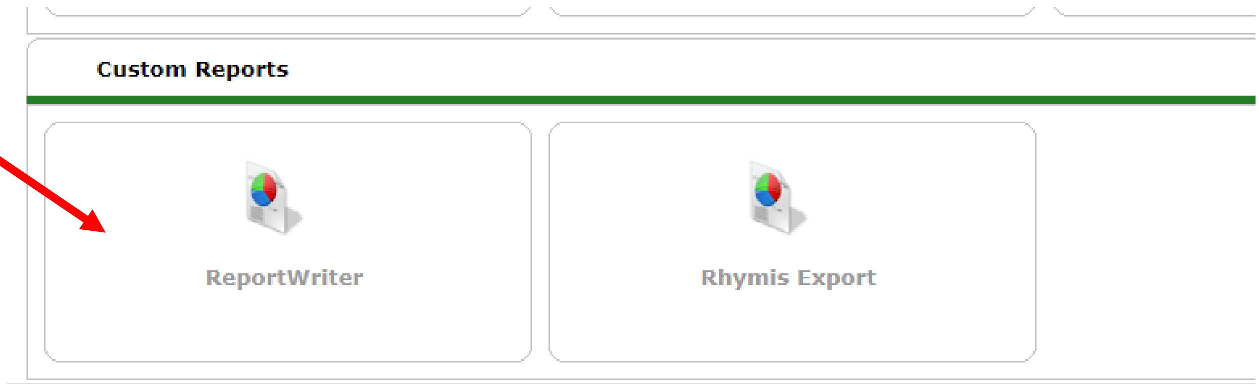
Use this workflow at the beginning of each shift and as new vacancies occur.

1. Check for empty rooms or beds that have been submitted by the Vacancy Forms from shelters.
2. Make sure you are not in a Front Door or Bed Placement projects Enter Data As mode. Use your default EDA mode of *Entry Point -Durham County* to ensure you see clients from both Front Door projects.
3. Pull waitlist report from HMIS.

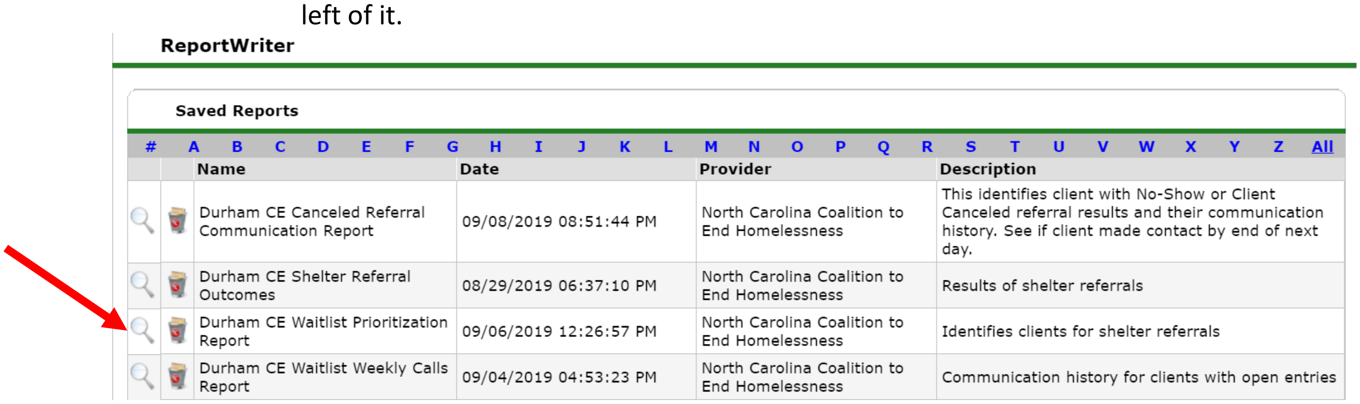
a. Click *Reports* from left hand menu.



b. Scroll to the bottom and click *ReportWriter* in the *Custom Reports* section.



c. Find the Durham CE Waitlist Prioritization report and click the magnifying glass to the left of it.



ReportWriter

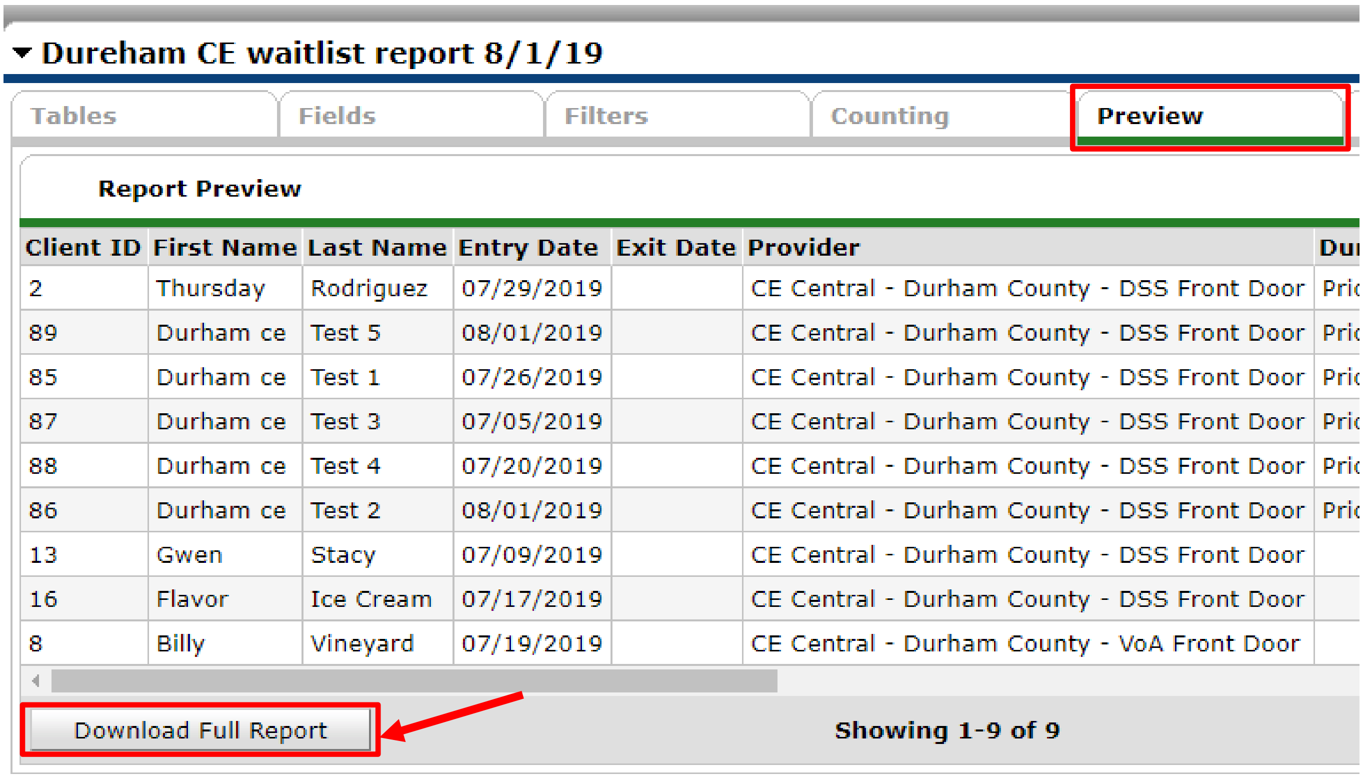
Saved Reports

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

		Name	Date	Provider	Description
		Durham CE Canceled Referral Communication Report	09/08/2019 08:51:44 PM	North Carolina Coalition to End Homelessness	This identifies client with No-Show or Client Canceled referral results and their communication history. See if client made contact by end of next day.
		Durham CE Shelter Referral Outcomes	08/29/2019 06:37:10 PM	North Carolina Coalition to End Homelessness	Results of shelter referrals
		Durham CE Waitlist Prioritization Report	09/06/2019 12:26:57 PM	North Carolina Coalition to End Homelessness	Identifies clients for shelter referrals
		Durham CE Waitlist Weekly Calls Report	09/04/2019 04:53:23 PM	North Carolina Coalition to End Homelessness	Communication history for clients with open entries

d. Check to make sure this is the report you need by viewing it on the *Preview* tab.

e. Click *Download Full Report* to download an excel version that can be filtered and sorted as needed.



Dureham CE waitlist report 8/1/19

Tables | Fields | Filters | Counting | Preview

Report Preview

Client ID	First Name	Last Name	Entry Date	Exit Date	Provider	Du
2	Thursday	Rodriguez	07/29/2019		CE Central - Durham County - DSS Front Door	Pric
89	Durham ce	Test 5	08/01/2019		CE Central - Durham County - DSS Front Door	Pric
85	Durham ce	Test 1	07/26/2019		CE Central - Durham County - DSS Front Door	Pric
87	Durham ce	Test 3	07/05/2019		CE Central - Durham County - DSS Front Door	Pric
88	Durham ce	Test 4	07/20/2019		CE Central - Durham County - DSS Front Door	Pric
86	Durham ce	Test 2	08/01/2019		CE Central - Durham County - DSS Front Door	Pric
13	Gwen	Stacy	07/09/2019		CE Central - Durham County - DSS Front Door	
16	Flavor	Ice Cream	07/17/2019		CE Central - Durham County - DSS Front Door	
8	Billy	Vineyard	07/19/2019		CE Central - Durham County - VoA Front Door	

Download Full Report

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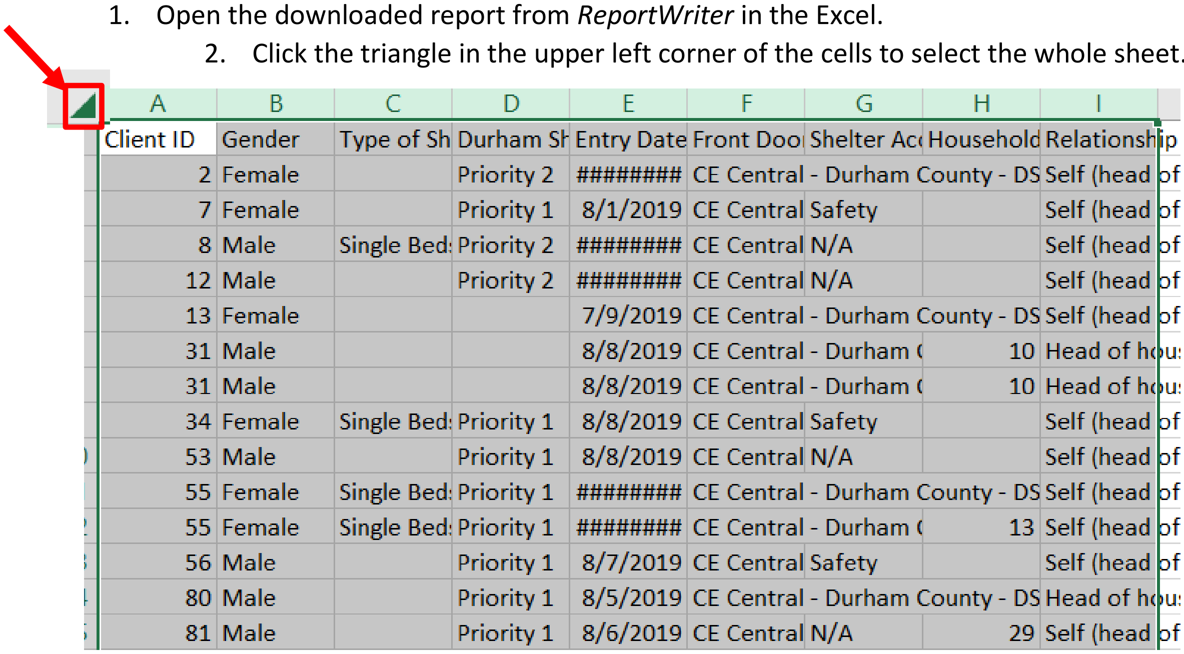
Prioritize the Waitlist

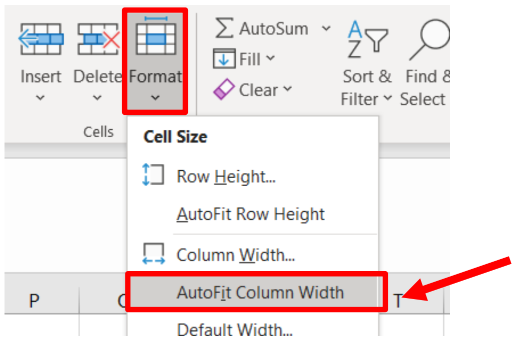
1. Open the downloaded report from *ReportWriter* in the Excel.
    2. Click the triangle in the upper left corner of the cells to select the whole sheet.



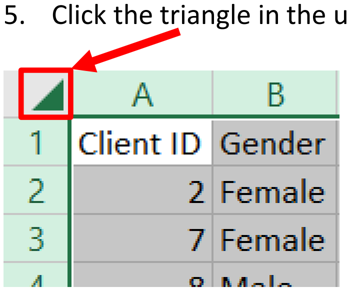
A	B	C	D	E	F	G	H	I
Client ID	Gender	Type of Sh	Durham Sh	Entry Date	Front Doo	Shelter Ac	Household	Relationship
2	Female		Priority 2	########	CE Central - Durham County - DS			Self (head of
7	Female		Priority 1	8/1/2019	CE Central	Safety		Self (head of
8	Male	Single Bed	Priority 2	########	CE Central	N/A		Self (head of
12	Male		Priority 2	########	CE Central	N/A		Self (head of
13	Female			7/9/2019	CE Central - Durham County - DS			Self (head of
31	Male			8/8/2019	CE Central - Durham (		10	Head of hou
31	Male			8/8/2019	CE Central - Durham (		10	Head of hou
34	Female	Single Bed	Priority 1	8/8/2019	CE Central	Safety		Self (head of
53	Male		Priority 1	8/8/2019	CE Central	N/A		Self (head of
55	Female	Single Bed	Priority 1	########	CE Central - Durham County - DS			Self (head of
55	Female	Single Bed	Priority 1	########	CE Central - Durham (		13	Self (head of
56	Male		Priority 1	8/7/2019	CE Central	Safety		Self (head of
80	Male		Priority 1	8/5/2019	CE Central - Durham County - DS			Head of hou
81	Male		Priority 1	8/6/2019	CE Central	N/A	29	Self (head of

3. Click *Format* from the default *Home* tab

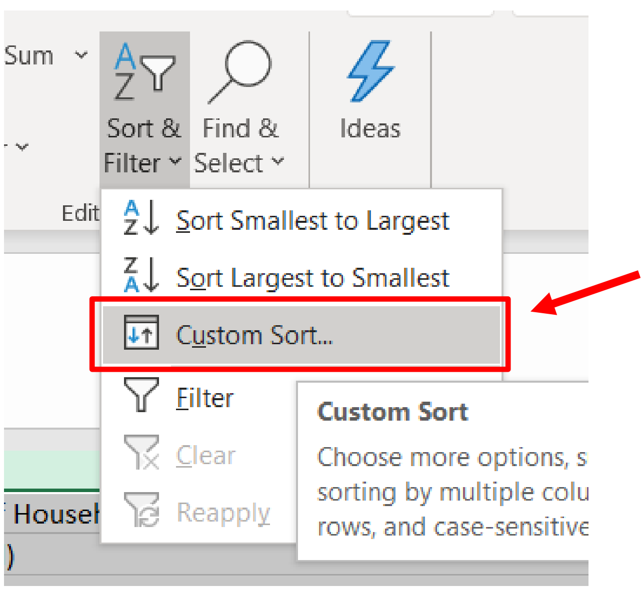
4. Click on *AutoFit Column Width* to adjust the width of the columns.



5. Click the triangle in the upper left corner of the cells to select the whole sheet.



6. Click *Sort & Filter* (under the default *Home* tab)
7. Then click *Custom Sort*

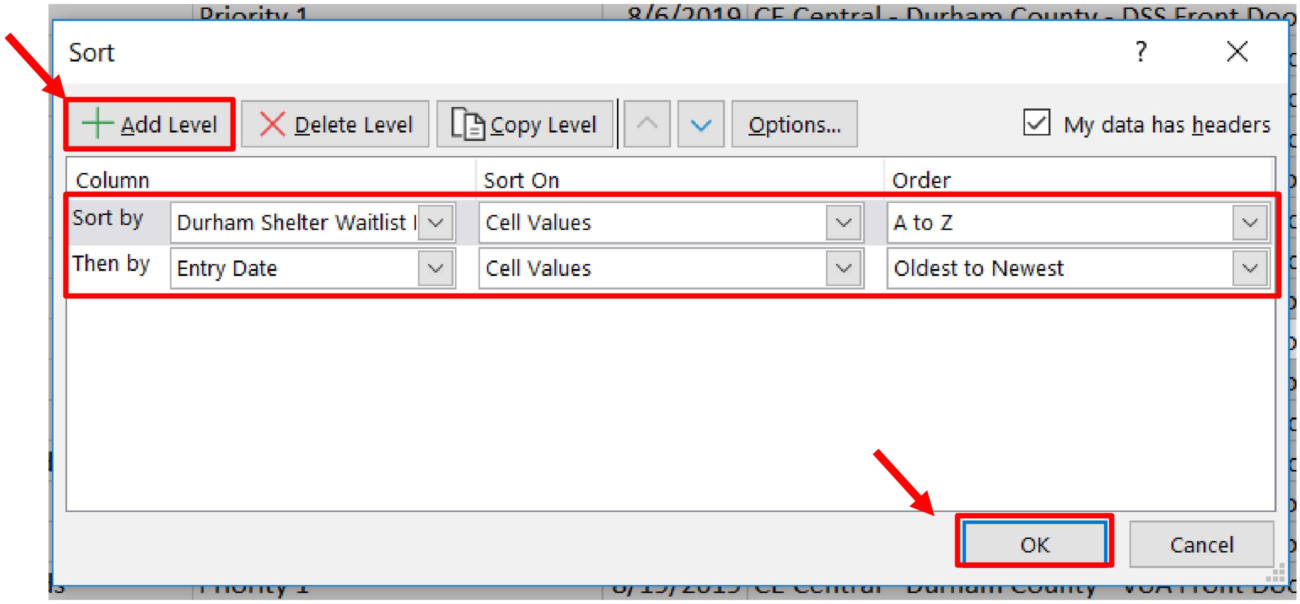


8. Fill in the fields to sort.
    a. Use *Durham Shelter Waitlist Priority* sorted from *A to Z* as level 1.

b. Click *Add Level*

c. Then sort by *Entry date* from *Oldest to Newest*.

d. Click *OK*.



9. The report is now sorted with highest priority group and oldest entry on top! Review the list along with Type of Shelter Bed, Gender, and Accommodations columns to determine who is appropriate for open shelter beds.

A	B	C	D	E	F	G
Client ID	Gender	Type of Shelter Beds	Durham Shelter Waitlist Priority	Entry Date	Front Door Project	Shelter Accommodations?
55	Female	Single Beds	Priority 1	7/18/2019	CE Central - Durham County - DSS Front Door	
7	Female		Priority 1	8/1/2019	CE Central - Durham County - DSS Front Door	Safety
80	Male		Priority 1	8/5/2019	CE Central - Durham County - DSS Front Door	
81	Male		Priority 1	8/6/2019	CE Central - Durham County - VoA Front Door	N/A
108	Male		Priority 1	8/6/2019	CE Central - Durham County - VoA Front Door	N/A
113	Female		Priority 1	8/6/2019	CE Central - Durham County - DSS Front Door	N/A
121	Male		Priority 1	8/6/2019	CE Central - Durham County - VoA Front Door	N/A
132	Female		Priority 1	8/6/2019	CE Central - Durham County - VoA Front Door	N/A
142	Female		Priority 1	8/6/2019	CE Central - Durham County - VoA Front Door	N/A
149	Male		Priority 1	8/6/2019	CE Central - Durham County - DSS Front Door	Safety
151	Male		Priority 1	8/6/2019	CE Central - Durham County - VoA Front Door	N/A
152	Female		Priority 1	8/6/2019	CE Central - Durham County - VoA Front Door	N/A
153	Male		Priority 1	8/6/2019	CE Central - Durham County - DSS Front Door	N/A
156	Female		Priority 1	8/6/2019	CE Central - Durham County - DSS Front Door	Safety
157	Male		Priority 1	8/6/2019	CE Central - Durham County - DSS Front Door	Langauge
56	Male		Priority 1	8/7/2019	CE Central - Durham County - VoA Front Door	Safety

Attempt to shelter the highest priority

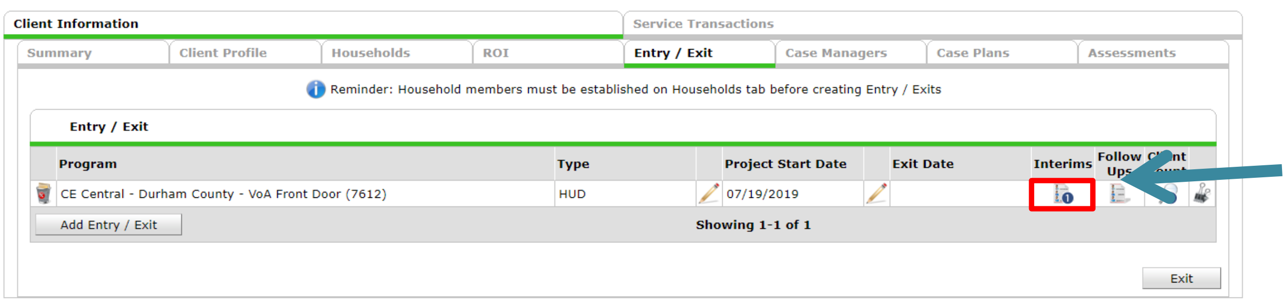
1. Contact this highest priority and longest waiting client/household who is eligible for available beds first (use all available contact methods). Note any referral declines and adjust place on wait list accordingly.
   a. Go into HMIS and the correct EDA mode (listed as *Front Door Project on the* report) and find the client through *ClientPoint.*
   b. Go to the client's *Entry/Exit* tab

c. Click on the *Interims* notepad icon and click *Add New Interim*
d. Select *Update* as the type of *Interim*
e. Click *Save & Continue*
    i. Record the communication attempt and results in the *Durham CE Communication* sub-assessment.

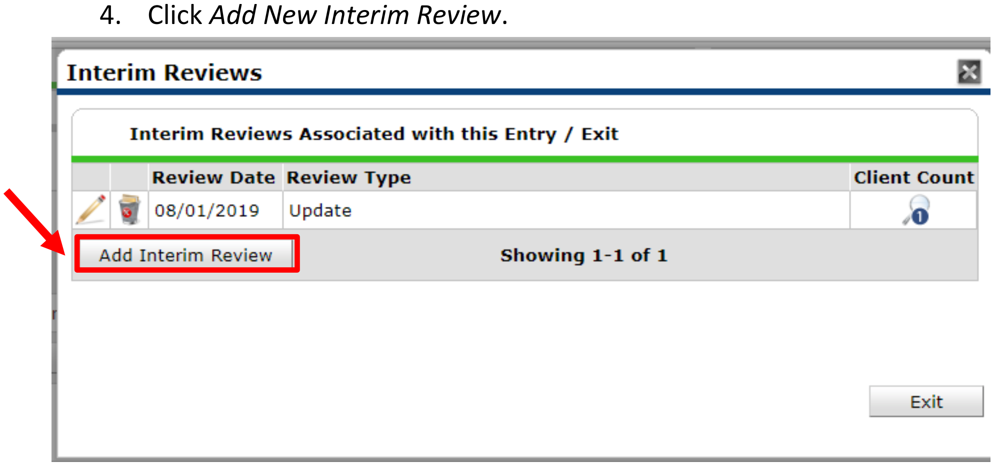
2. If client is contacted and still in need of shelter services, refer them to shelter.
3. If client cannot be contacted, mark the attempt to contact on interim assessment in contacts sub-assessment in HMIS.
    a. If staff is able to leave a message for the client (voicemail, text, or with a third party), do not give intake details or guarantee a bed. A referral to shelter cannot be completed based on a left message.
    b. If the client cannot be contacted within 2 hours of Entry Point closing, go back to beginning of waitlist workflow, find another client who can fill the bed.

Record the Contact in HMIS

1. Once logged into HMIS, confirm *EDA* for the correct Front Door project.
2. Use *ClientPoint* to navigate to the *Head of Household*'s profile.
3. Go to the *Entry/Exit* tab and find the open Front Door entry.
    a. Click on the document icon under the *Interims* column.



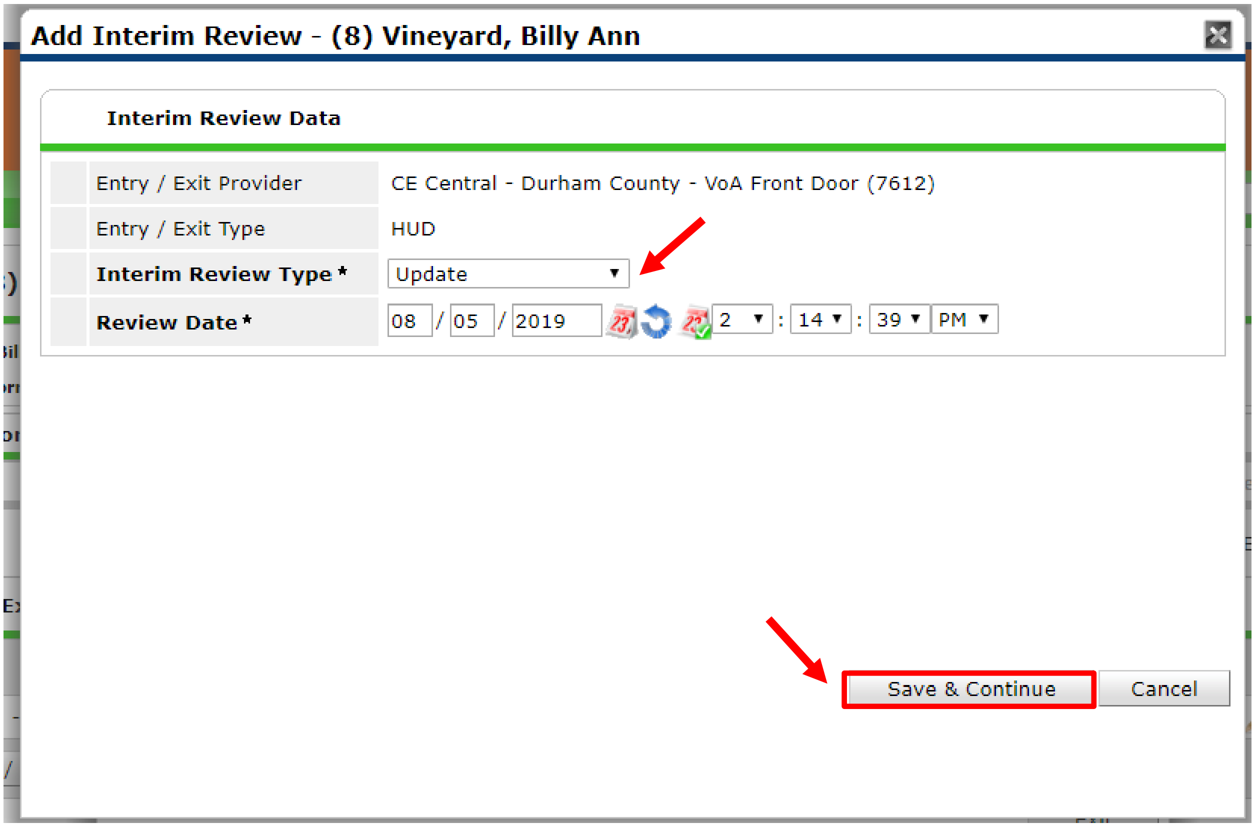
4. Click *Add New Interim Review*.



    a. Confirm the *Provider* is correct. If it is not, cancel the interim and change your *EDA* mode.
    b. Select *Update* for *Interim Review Type.*

c. Confirm the *Review date.*

d. *Click Save & Continue.*

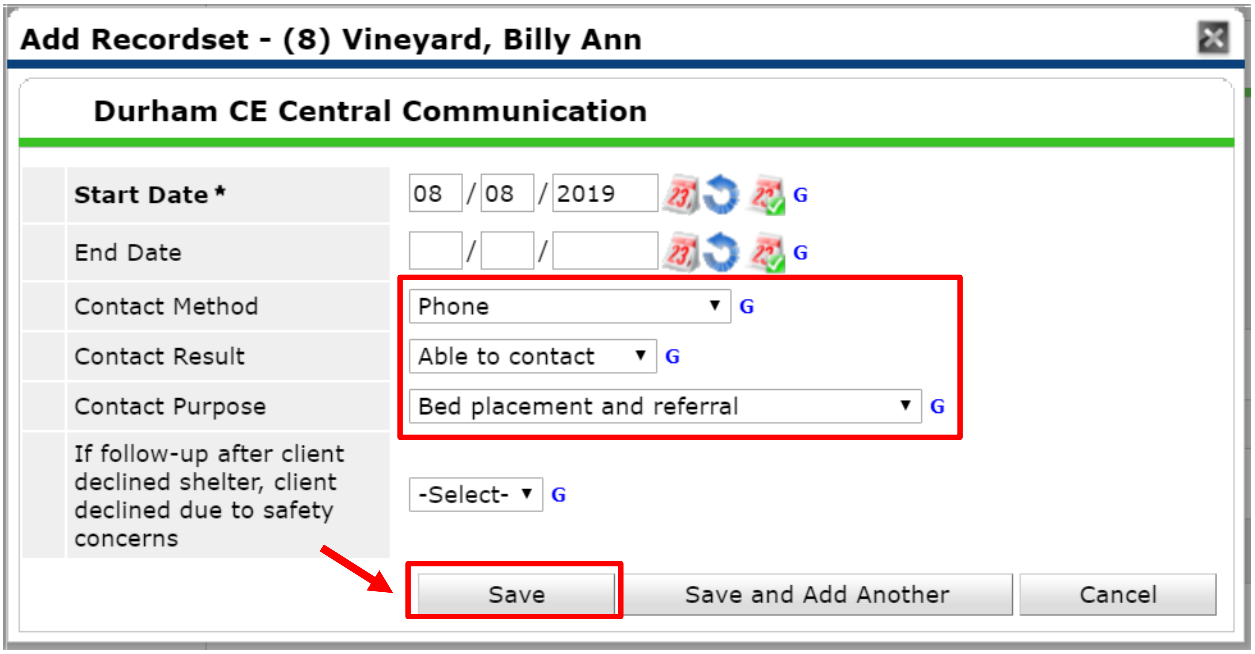


5. View the *Communication* and *Client Contact Information* sub-assessments at the bottom.
    a. If the client has declined shelter placement two times in the last three month for a non-safety reason, get a hard confirmation from the client for a specific intake time. Advise them that the bed will not be held for them.
        i. If staff contact an adult client after a no show, they will establish a deadline for arrival and release the bed after missing the deadline.
        ii. If a family no shows for intake 2 times in 3 months, then the bed will not be held overnight, but Entry Point does need to attempt to contact.
    b. Reach out to the client using this information.

6. If the client is reached, review the responses to the *Project Interim: Durham CE Front Door* and update anything that has changed.
    a. Update the *Homeless History* section if the client's housing situation has changed.
    b. Update the *Client Resources* section if the *Income* or *Non-Cash Benefits* have changed.

7. Add the contact to record the client no-show follow-up by clicking *Add* in the *Contact* sub-assessment.
    a. Confirm date for the contact as the *Start Date.*
    b. Complete the *Contact Method*, *Result*, and *Purpose.*
    c. Click *Save.*

d. Try as many available ways to contact the client as possible and available. Record additional attempts at communication if the method or result is different.



8. If the client declines or cancels their shelter request for a non-safety related reason:
    a. Record the result in *If follow-up after client canceled shelter, client canceled due to safety concerns.*
    b. Exit the client from the Front Door project.

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Daily Referral Resolution

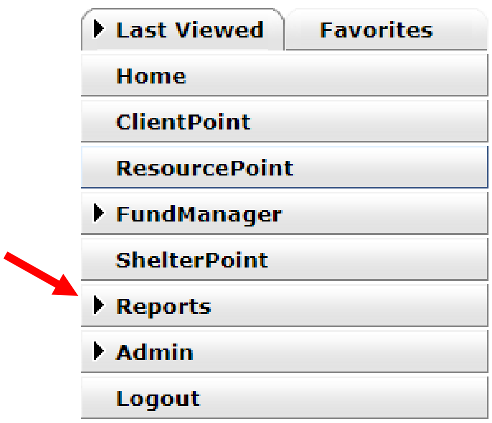
To keep the waitlist current, Entry Point must resolve all referrals from the previous day and remove anyone who no longer needs shelter from the wait list. The following steps should be completed daily:

1. Pull referral report for previous day.
2. Make sure all referrals are resolved by shelter. If not, ask the shelter to resolve previous day referrals.
3. Exit in HMIS any clients who were successfully referred to shelter the previous day.
4. Follow up with anyone who declined or no-showed their shelter bed the previous day to figure out if client still needs to stay on waitlist.
    a. When contact is made, complete interim assessment, including contact sub-assessment.
        i. If client is unsafe at original shelter to which they were referred, keep on top of waitlist, re-refer to another shelter if possible.

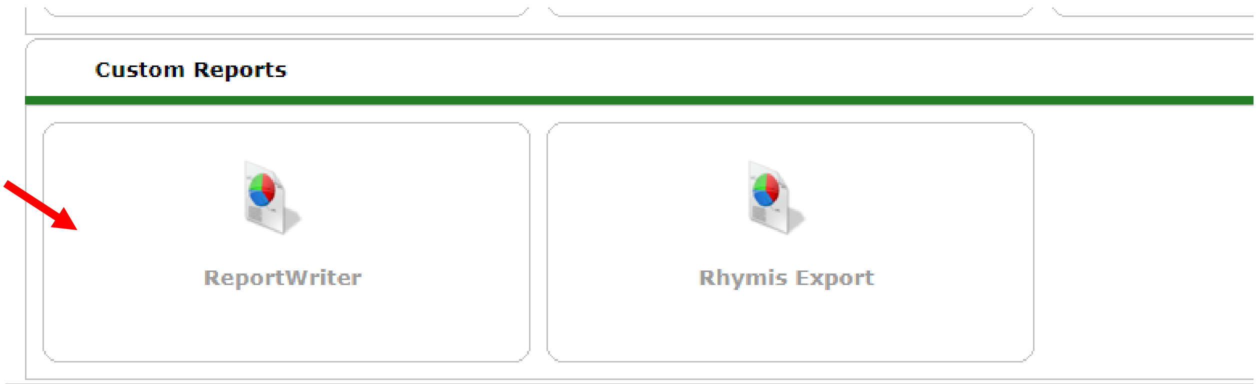
ii. If client did not have a safety reason for declining the referral, note in interim assessment.

Pull the report from *ReportWriter*

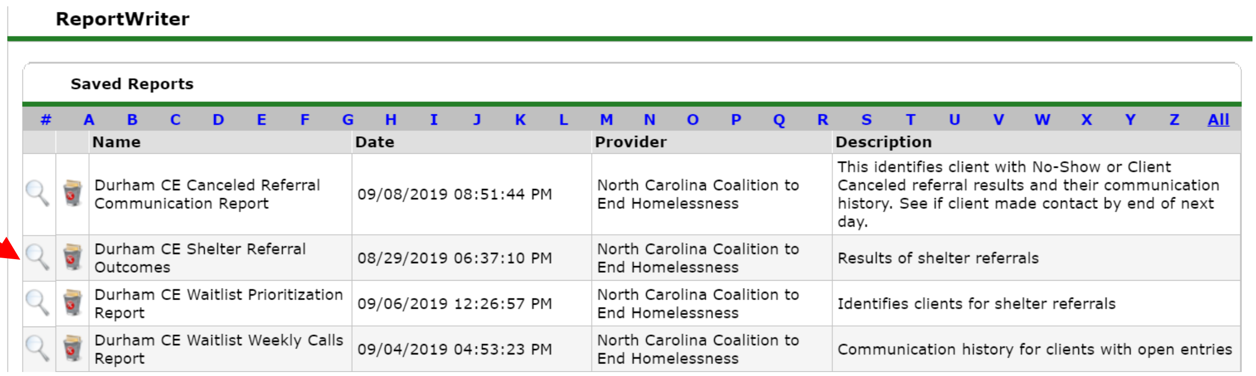
1. Make sure you are not in a Front Door or Bed Placement projects Enter Data As mode. Use your default EDA mode of *Entry Point -Durham County* to ensure you see clients from both Front Door projects.
2. Click *Reports* from left hand menu.



3. Scroll to the bottom and click *ReportWriter* in the *Custom Reports* section.



4. Find the *Durham CE Shelter Referral Outcomes* and click the magnifying glass next to it.



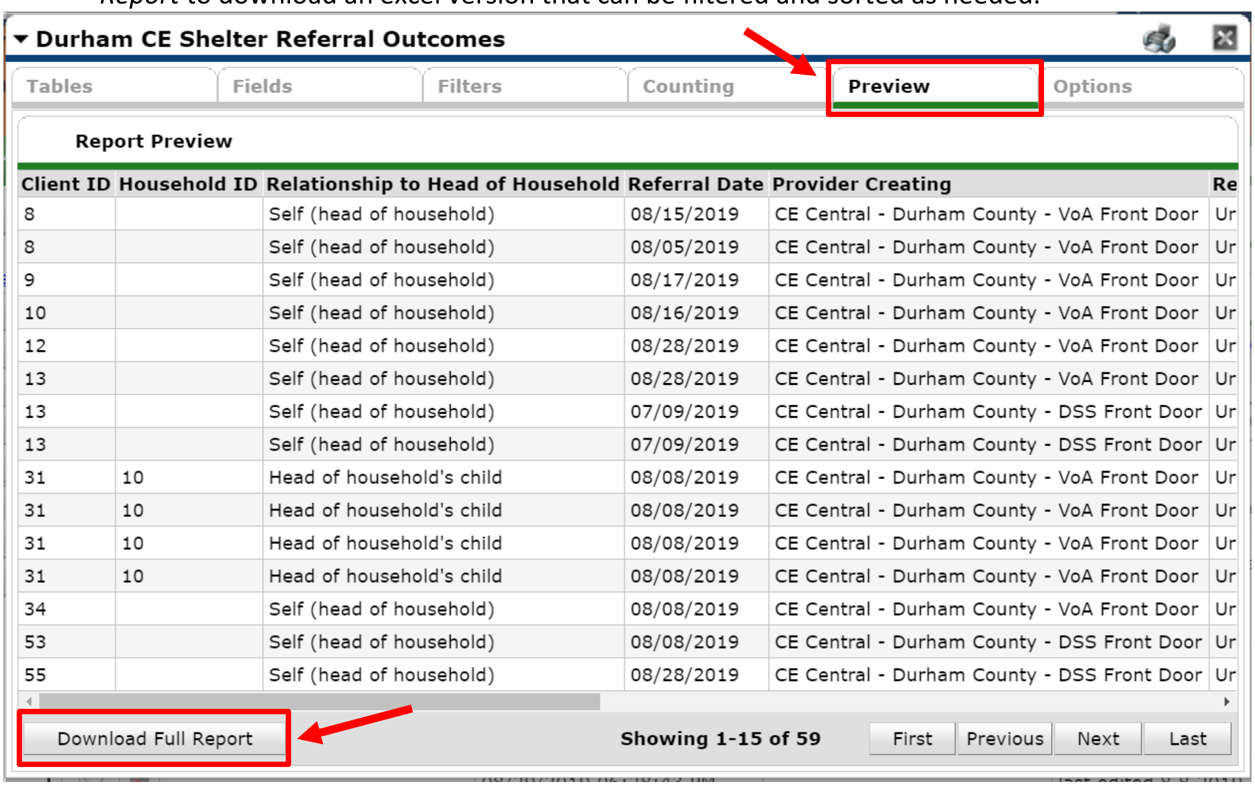
ReportWriter

Saved Reports

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Name	Date	Provider	Description
Durham CE Canceled Referral Communication Report	09/08/2019 08:51:44 PM	North Carolina Coalition to End Homelessness	This identifies client with No-Show or Client Canceled referral results and their communication history. See if client made contact by end of next day.
Durham CE Shelter Referral Outcomes	08/29/2019 06:37:10 PM	North Carolina Coalition to End Homelessness	Results of shelter referrals
Durham CE Waitlist Prioritization Report	09/06/2019 12:26:57 PM	North Carolina Coalition to End Homelessness	Identifies clients for shelter referrals
Durham CE Waitlist Weekly Calls Report	09/04/2019 04:53:23 PM	North Carolina Coalition to End Homelessness	Communication history for clients with open entries

5. Most of report can be viewed in the *Preview* tab of report. You can also click *Download Full Report* to download an excel version that can be filtered and sorted as needed.



Durham CE Shelter Referral Outcomes

Tables | Fields | Filters | Counting | Preview | Options

Report Preview

Client ID	Household ID	Relationship to Head of Household	Referral Date	Provider Creating	Re
8		Self (head of household)	08/15/2019	CE Central - Durham County - VoA Front Door	Ur
8		Self (head of household)	08/05/2019	CE Central - Durham County - VoA Front Door	Ur
9		Self (head of household)	08/17/2019	CE Central - Durham County - VoA Front Door	Ur
10		Self (head of household)	08/16/2019	CE Central - Durham County - VoA Front Door	Ur
12		Self (head of household)	08/28/2019	CE Central - Durham County - VoA Front Door	Ur
13		Self (head of household)	08/28/2019	CE Central - Durham County - VoA Front Door	Ur
13		Self (head of household)	07/09/2019	CE Central - Durham County - DSS Front Door	Ur
13		Self (head of household)	07/09/2019	CE Central - Durham County - DSS Front Door	Ur
31	10	Head of household's child	08/08/2019	CE Central - Durham County - VoA Front Door	Ur
31	10	Head of household's child	08/08/2019	CE Central - Durham County - VoA Front Door	Ur
31	10	Head of household's child	08/08/2019	CE Central - Durham County - VoA Front Door	Ur
31	10	Head of household's child	08/08/2019	CE Central - Durham County - VoA Front Door	Ur
34		Self (head of household)	08/08/2019	CE Central - Durham County - VoA Front Door	Ur
53		Self (head of household)	08/08/2019	CE Central - Durham County - DSS Front Door	Ur
55		Self (head of household)	08/28/2019	CE Central - Durham County - DSS Front Door	Ur

Download Full Report | Showing 1-15 of 59 | First | Previous | Next | Last

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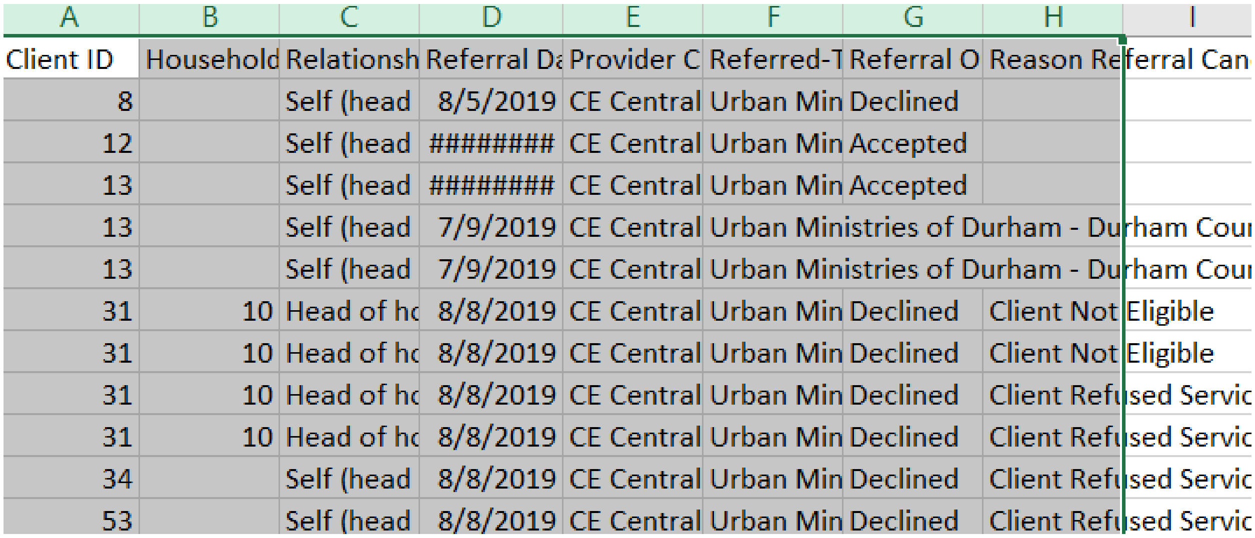
Review the Referral Outcomes

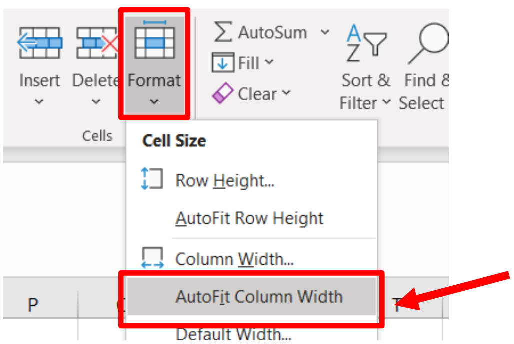
1. After downloading the report from *ReportWriter* open the excel document.

2. Select all of the columns.

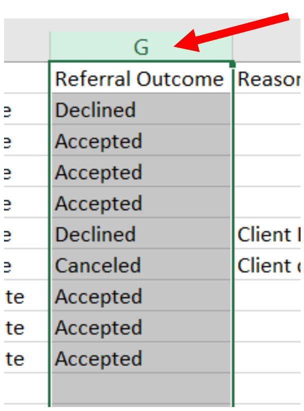


A	B	C	D	E	F	G	H	I
Client ID	Household	Relationsh	Referral Da	Provider C	Referred-T	Referral O	Reason Referral Can	
8		Self (head	8/5/2019	CE Central	Urban Min	Declined		
12		Self (head	########	CE Central	Urban Min	Accepted		
13		Self (head	########	CE Central	Urban Min	Accepted		
13		Self (head	7/9/2019	CE Central	Urban Ministries of Durham - Durham Cour			
13		Self (head	7/9/2019	CE Central	Urban Ministries of Durham - Durham Cour			
31	10	Head of hc	8/8/2019	CE Central	Urban Min	Declined	Client Not Eligible	
31	10	Head of hc	8/8/2019	CE Central	Urban Min	Declined	Client Not Eligible	
31	10	Head of hc	8/8/2019	CE Central	Urban Min	Declined	Client Refused Servic	
31	10	Head of hc	8/8/2019	CE Central	Urban Min	Declined	Client Refused Servic	
34		Self (head	8/8/2019	CE Central	Urban Min	Declined	Client Refused Servic	
53		Self (head	8/8/2019	CE Central	Urban Min	Declined	Client Refused Servic	

3. Click Format and then auto-fit column width

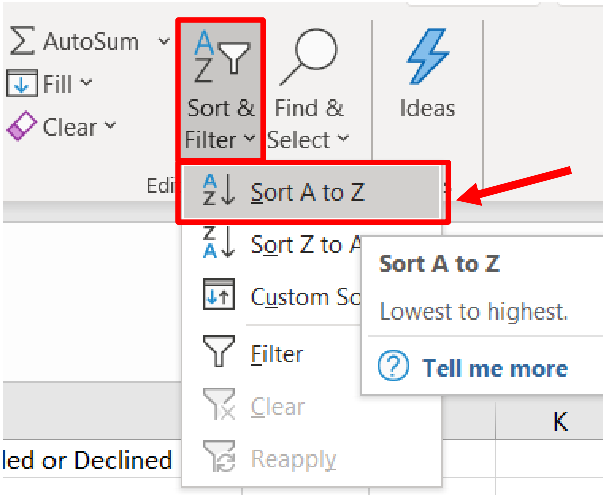


4. Select Column G.

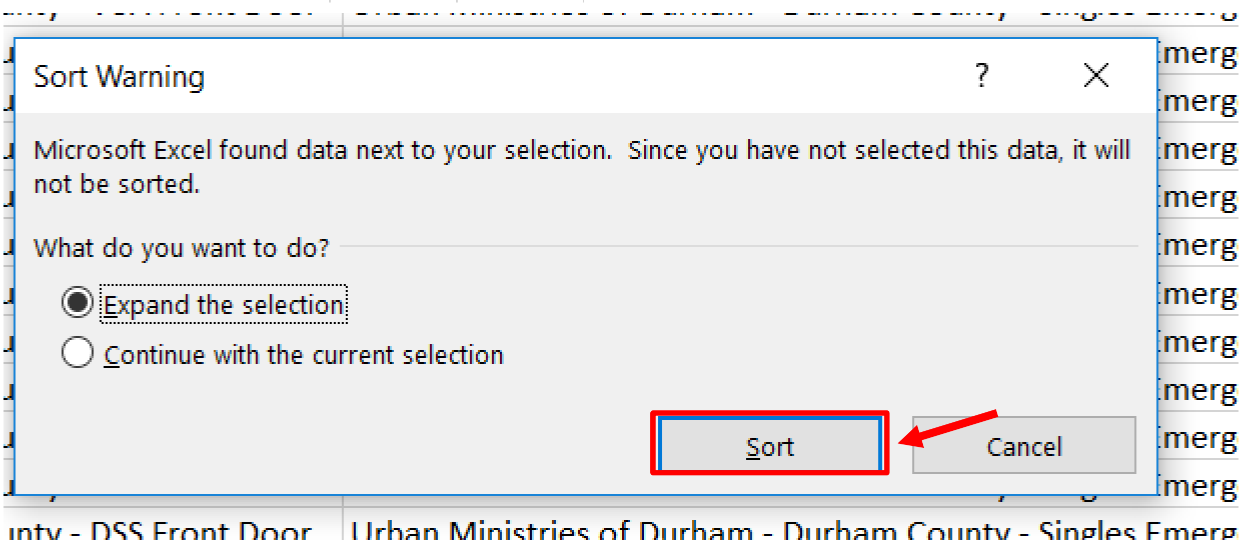


5. Click *Sort & Filter* under the default *Home* tab.

6. and then Sort *A to Z.*



7. Select Expand the selection in the Sort



Warning that pops up and then click Sort.

8. Referrals are now sorted by their outcome and you can see which referrals were accepted and declined or cancelled and why. Update client records accordingly in HMIS.
    a. Exit clients from Entry Point project if their referral was *Accepted*.
    b. Clients that no-showed or declined shelter should be contacted for follow-up.
    c. Clients that with the *Reason* listed as *Client was denied services* should be contacted to attempt to discover or find alternative shelter.

Referred-To Provider	Referral Outcome	Reason Referral Canceled or Declined
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Accepted	
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Accepted	
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Accepted	
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Accepted	
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Accepted	
Urban Ministries of Durham - Durham County - Families Emergency Shelter - Private	Accepted	
Urban Ministries of Durham - Durham County - Families Emergency Shelter - Private	Accepted	
Urban Ministries of Durham - Durham County - Families Emergency Shelter - Private	Accepted	
Families Moving Forward - Durham County - The NEST - City ESG State ESG	Accepted	
Families Moving Forward - Durham County - The NEST - City ESG State ESG	Accepted	
Families Moving Forward - Durham County - The NEST - City ESG State ESG	Accepted	
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Accepted	
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Accepted	
Urban Ministries of Durham - Durham County - Families Emergency Shelter - Private	Accepted	
Urban Ministries of Durham - Durham County - Families Emergency Shelter - Private	Accepted	
Urban Ministries of Durham - Durham County - Families Emergency Shelter - Private	Accepted	
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Canceled	Client did not return/complete application
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Canceled	Client Refused Service
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Canceled	Client Refused Service
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Canceled	Client Refused Service
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Declined	
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Declined	Client Not Eligible
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Declined	Client Not Eligible

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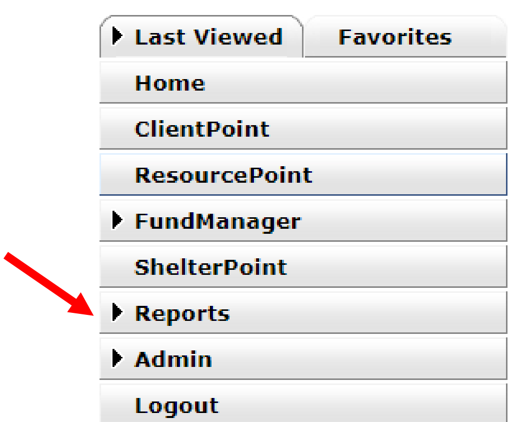
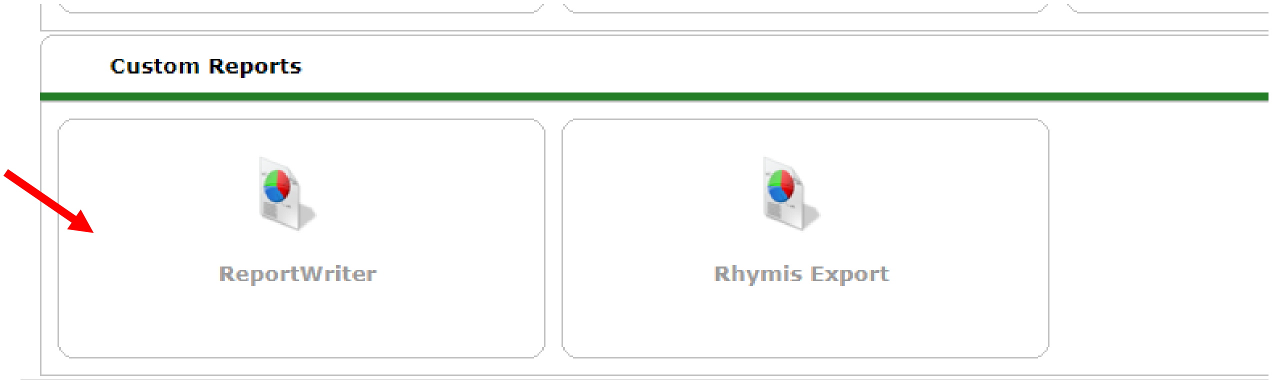
Client Canceled Referral Resolution

Pull the report from *ReportWriter*

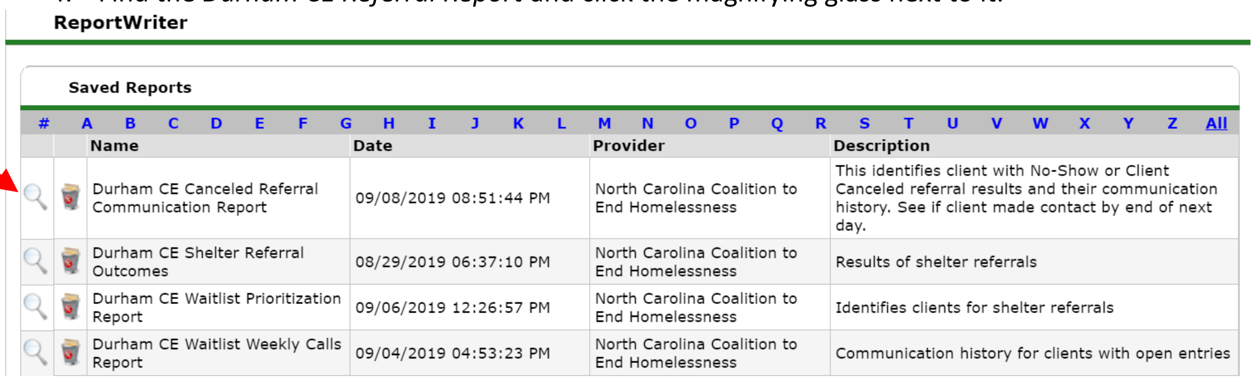
1. Make sure you are not in a Front Door or Bed Placement projects Enter Data As mode. Use your default EDA mode of *Entry Point -Durham County* to ensure you see clients from both Front Door projects.
2. Click *Reports* from left hand menu.



3. Scroll to the bottom and click *ReportWriter* in the *Custom Reports* section.

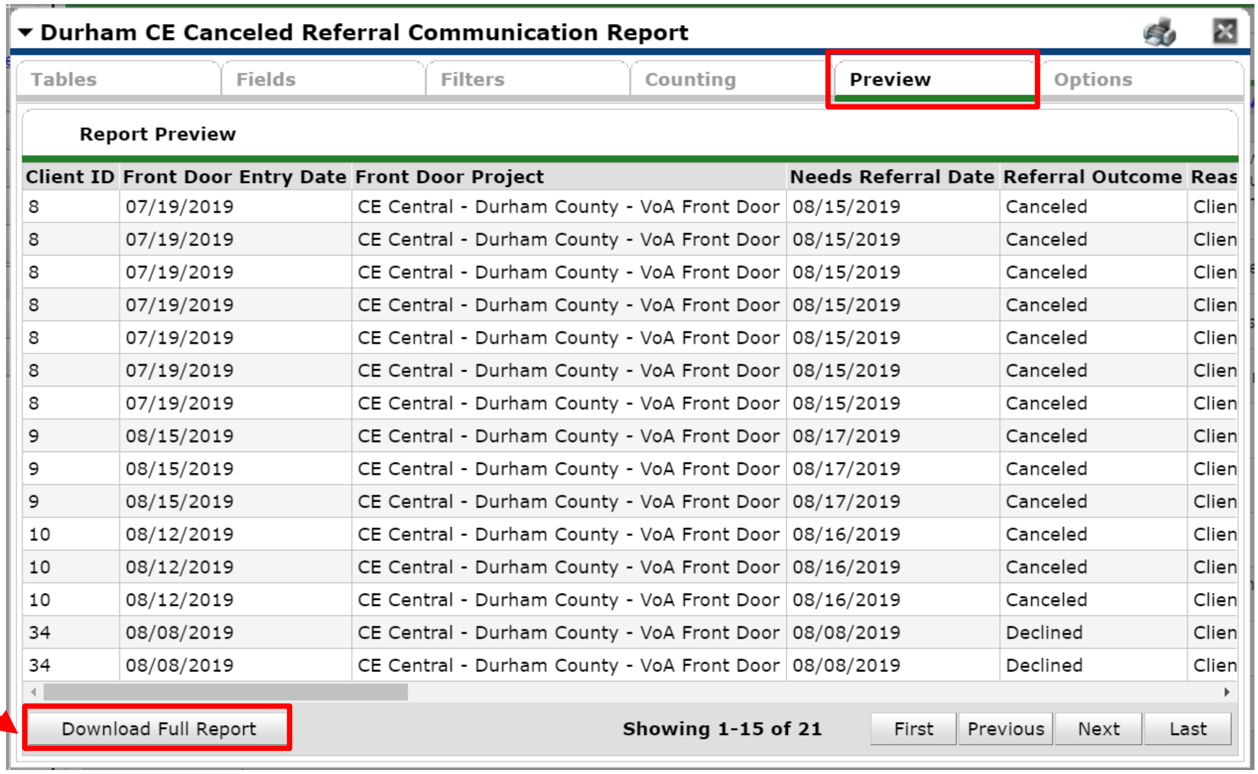


4. Find the *Durham CE Referral Report* and click the magnifying glass next to it.



Name	Date	Provider	Description
Durham CE Canceled Referral Communication Report	09/08/2019 08:51:44 PM	North Carolina Coalition to End Homelessness	This identifies client with No-Show or Client Canceled referral results and their communication history. See if client made contact by end of next day.
Durham CE Shelter Referral Outcomes	08/29/2019 06:37:10 PM	North Carolina Coalition to End Homelessness	Results of shelter referrals
Durham CE Waitlist Prioritization Report	09/06/2019 12:26:57 PM	North Carolina Coalition to End Homelessness	Identifies clients for shelter referrals
Durham CE Waitlist Weekly Calls Report	09/04/2019 04:53:23 PM	North Carolina Coalition to End Homelessness	Communication history for clients with open entries

5. Go to the *Preview* tab and click *Download Full Report*



Durham CE Canceled Referral Communication Report

Tables | Fields | Filters | Counting | Preview | Options

Report Preview

Client ID	Front Door Entry Date	Front Door Project	Needs Referral Date	Referral Outcome	Reas
8	07/19/2019	CE Central - Durham County - VoA Front Door	08/15/2019	Canceled	Clien
8	07/19/2019	CE Central - Durham County - VoA Front Door	08/15/2019	Canceled	Clien
8	07/19/2019	CE Central - Durham County - VoA Front Door	08/15/2019	Canceled	Clien
8	07/19/2019	CE Central - Durham County - VoA Front Door	08/15/2019	Canceled	Clien
8	07/19/2019	CE Central - Durham County - VoA Front Door	08/15/2019	Canceled	Clien
8	07/19/2019	CE Central - Durham County - VoA Front Door	08/15/2019	Canceled	Clien
8	07/19/2019	CE Central - Durham County - VoA Front Door	08/15/2019	Canceled	Clien
9	08/15/2019	CE Central - Durham County - VoA Front Door	08/17/2019	Canceled	Clien
9	08/15/2019	CE Central - Durham County - VoA Front Door	08/17/2019	Canceled	Clien
9	08/15/2019	CE Central - Durham County - VoA Front Door	08/17/2019	Canceled	Clien
10	08/12/2019	CE Central - Durham County - VoA Front Door	08/16/2019	Canceled	Clien
10	08/12/2019	CE Central - Durham County - VoA Front Door	08/16/2019	Canceled	Clien
10	08/12/2019	CE Central - Durham County - VoA Front Door	08/16/2019	Canceled	Clien
34	08/08/2019	CE Central - Durham County - VoA Front Door	08/08/2019	Declined	Clien
34	08/08/2019	CE Central - Durham County - VoA Front Door	08/08/2019	Declined	Clien

Download Full Report | Showing 1-15 of 21 | First | Previous | Next | Last

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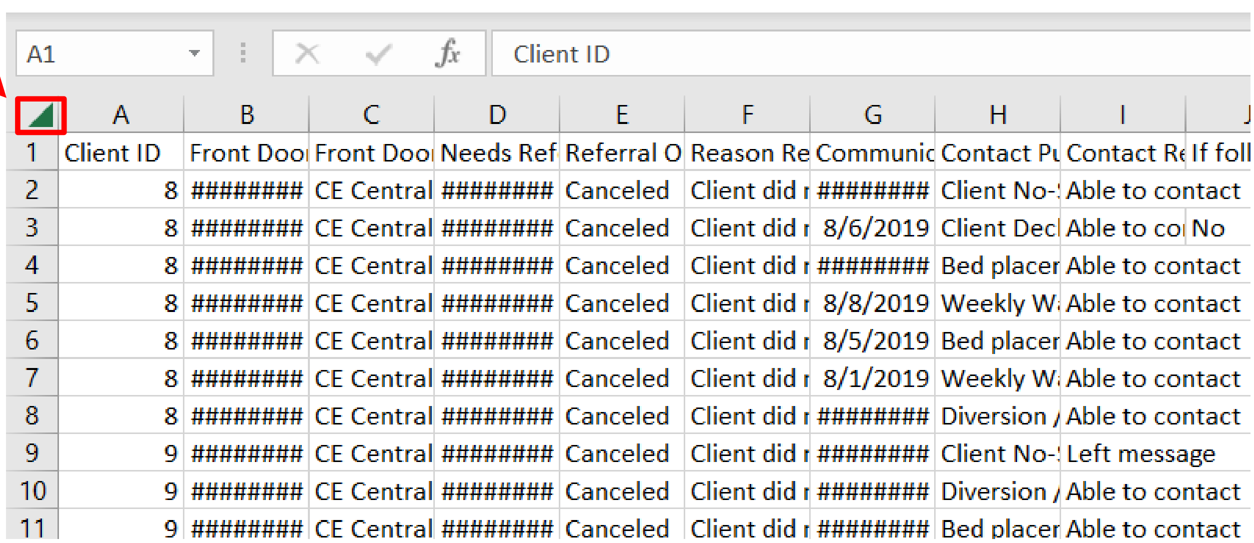
Find this week's No-Shows

1. Open the downloaded report from *ReportWriter* in the Excel.
2. Click the triangle in the upper left corner of the cells to select the whole sheet.

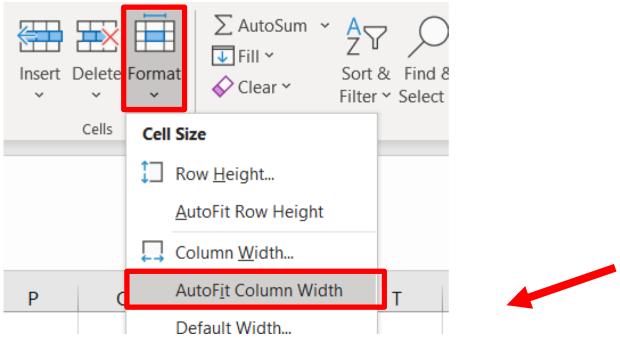


A1 | Client ID

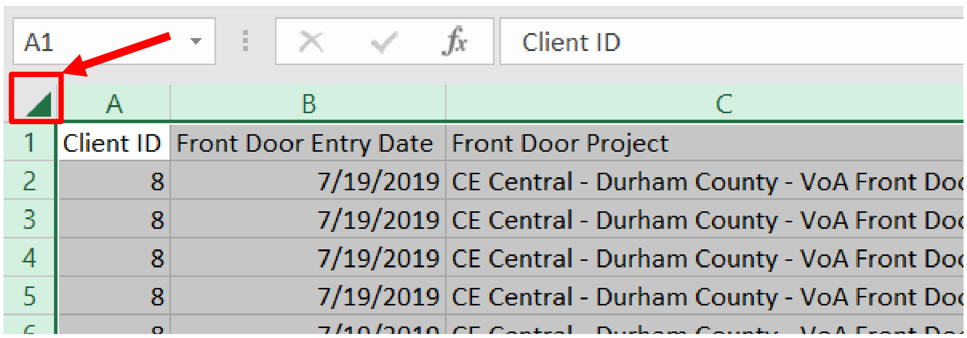
	A	B	C	D	E	F	G	H	I	J
1	Client ID	Front Door	Front Door	Needs Ref	Referral O	Reason Re	Communic	Contact Pu	Contact Re	If foll
2	8	########	CE Central	########	Canceled	Client did r	########	Client No-S	Able to contact	
3	8	########	CE Central	########	Canceled	Client did r	8/6/2019	Client Decl	Able to co	No
4	8	########	CE Central	########	Canceled	Client did r	########	Bed placer	Able to contact	
5	8	########	CE Central	########	Canceled	Client did r	8/8/2019	Weekly W	Able to contact	
6	8	########	CE Central	########	Canceled	Client did r	8/5/2019	Bed placer	Able to contact	
7	8	########	CE Central	########	Canceled	Client did r	8/1/2019	Weekly W	Able to contact	
8	8	########	CE Central	########	Canceled	Client did r	########	Diversion /	Able to contact	
9	9	########	CE Central	########	Canceled	Client did r	########	Client No-S	Left message	
10	9	########	CE Central	########	Canceled	Client did r	########	Diversion /	Able to contact	
11	9	########	CE Central	########	Canceled	Client did r	########	Bed placer	Able to contact	

3. Click *Format* from the default *Home* tab

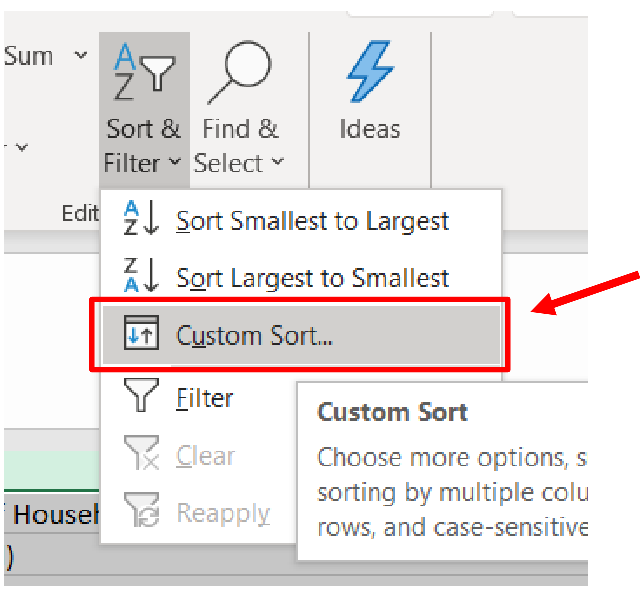
4. Click on *AutoFit Column Width* to adjust the width of the columns.



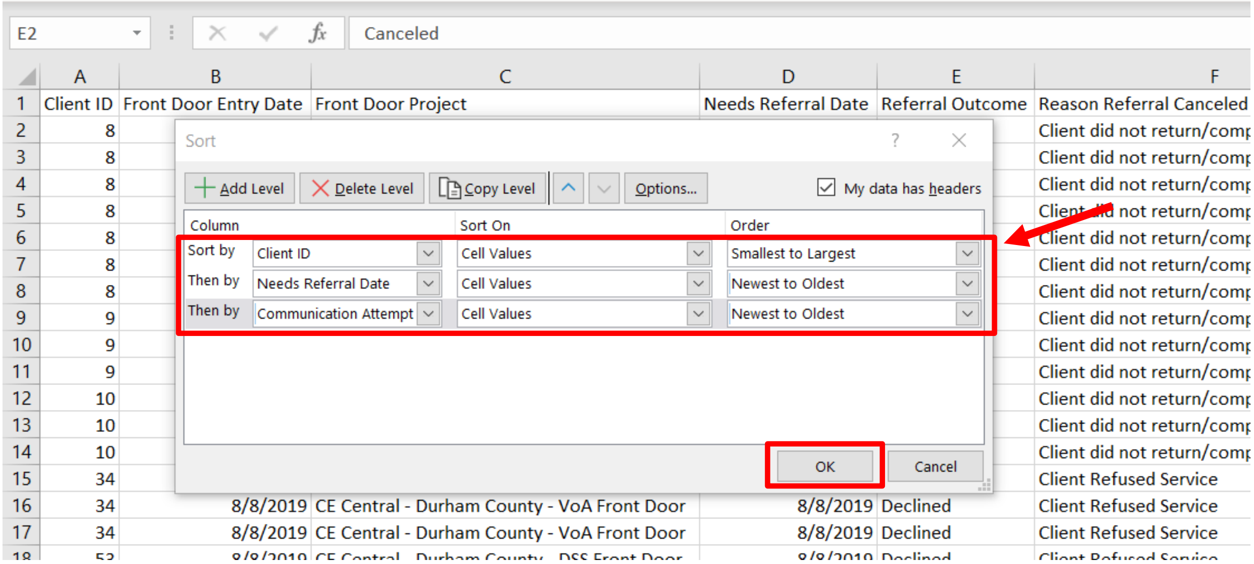
5. Click the triangle in the upper left corner of the cells to select the whole sheet.



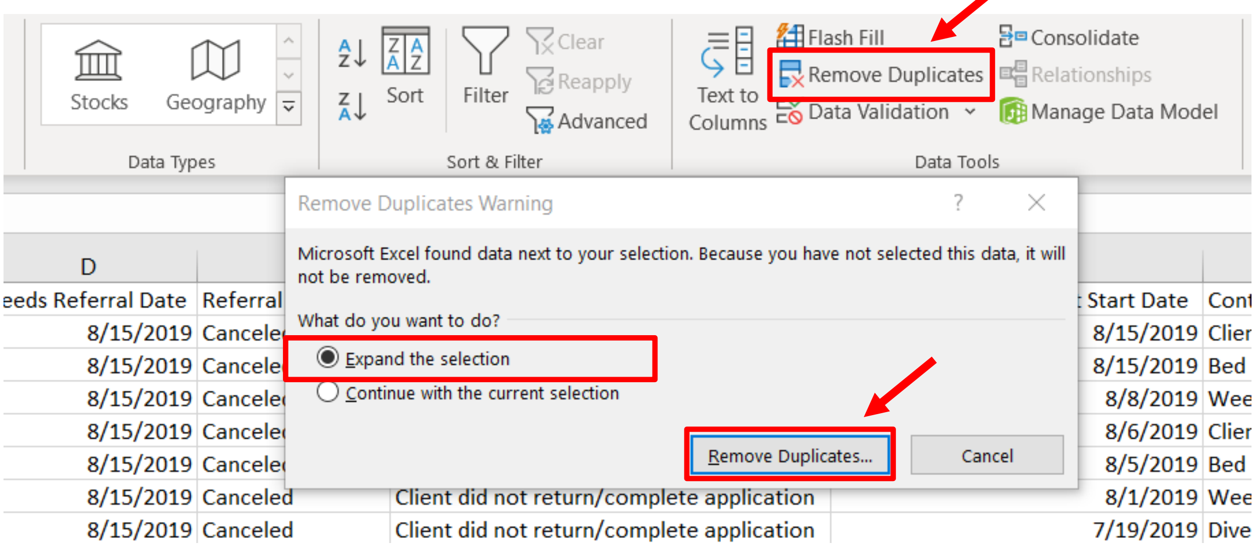
6. Click *Sort & Filter* (under the default *Home* tab)
7. Then click *Custom Sort*



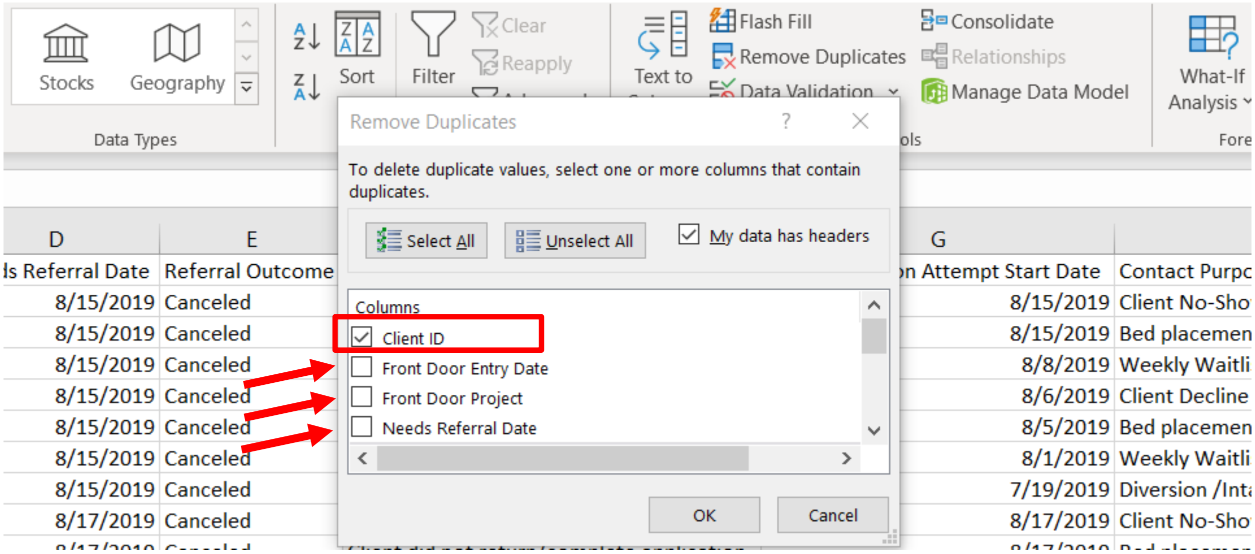
8. Fill in the fields to sort.



9. Find anyone who no-showed the previous day and did not make subsequent contact.
   a. To do this, remove all of the old communication history by using *Remove Duplicates*.
      i. Select *Expand* on the pop-up warning that appears.



   b. Uncheck all columns except Client ID. Only Client ID should be checked to have duplicates removed.



c. The list now contains the most recent Referral Outcome and the most recent Communication for each client. Review each client to see if the most recent communication is for the purpose of *Client No-Show Follow-up* and if the result was *Able to contact*.

   i. Each client has until 10 pm the next day to contact Entry Point. For referrals sent on 8/15, staff would find clients without communication on 8/16. After 8/16, the client could be removed from the waitlist and exited in HMIS.

   ii. See client 9 and 10 in the example below.

d. If the clients make contact during the day, note a successful contact on interim assessment contact sub-assessment. Keep HMIS entry open and on shelter waitlist.

   i. See client 8 in the example below.

Client ID	Front Door Entry Date	Front Door Project	Needs Referral Date	Referral Outcome	Reason Referral Canceled or Declined	Communication Attempt Start Date	Contact Purpose	Contact Result	If
8	7/19/2019	CE Central - Durham County - VoA Front Door	8/15/2019	Canceled	Client did not return/complete application	8/15/2019	Client No-Show follow-up	Able to contact	
9	8/15/2019	CE Central - Durham County - VoA Front Door	8/17/2019	Canceled	Client did not return/complete application	8/17/2019	Client No-Show follow-up	Left message	
10	8/12/2019	CE Central - Durham County - VoA Front Door	8/16/2019	Canceled	Client did not return/complete application	8/17/2019	Client No-Show follow-up	Left message	

10. Exit clients at your discretion. Go to for full steps.

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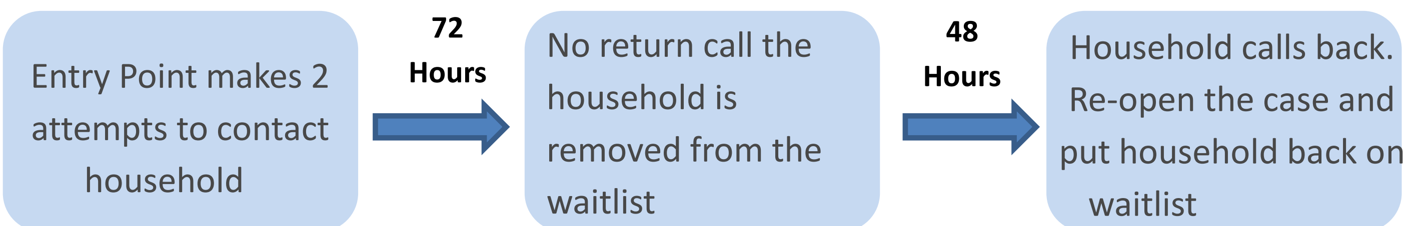
Weekly Contacts to Waitlisted Households

Everyone on the shelter waitlist should be contacted at least weekly. Use the following steps to contact people on the waitlist:

Waitlist weekly call workflow

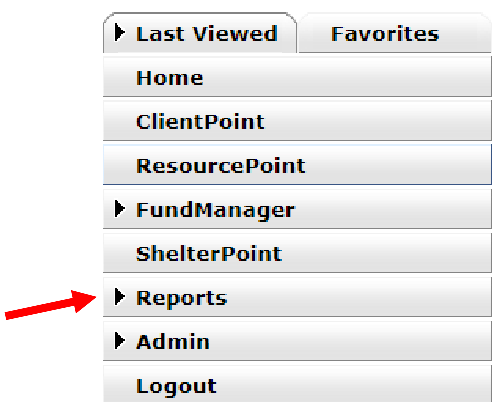
1. Weekly follow up: Entry Point staff should call everyone on the waitlist at least once per week to confirm their shelter needs.
    a. If a client no longer needs shelter at follow-up, exit them from the Front Door project in HMIS.
    b. If a client continues to need shelter, record the successful follow up attempt on an *Interim* assessment in the *Communication* sub-assessment.
    c. If client cannot be contacted, record the unsuccessful follow up attempt on the *Interim* assessment in the contacts sub-assessment.
2. Check for households that have had two unsuccessful attempts to contact in a row. If it has been more than 72 hours since the last contact, remove from waitlist by completing an exit from the front door project in HMIS. Go to Removing clients from the Waitlist for complete steps.
3. If a client that was exited calls back within 48 hours of exit, reinstate on waitlist by deleting their project exit in HMIS. Go to How to add clients back to the Waitlist for complete steps.



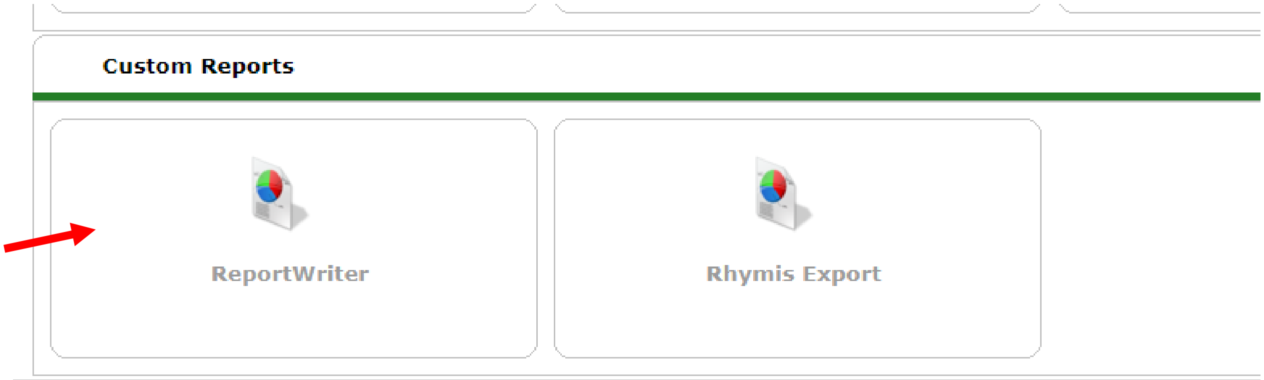
7. Exit anyone who has no-showed 3 days in a row after repeatedly being offered a shelter bed referral.

Pull the Waitlist Weekly Calls report

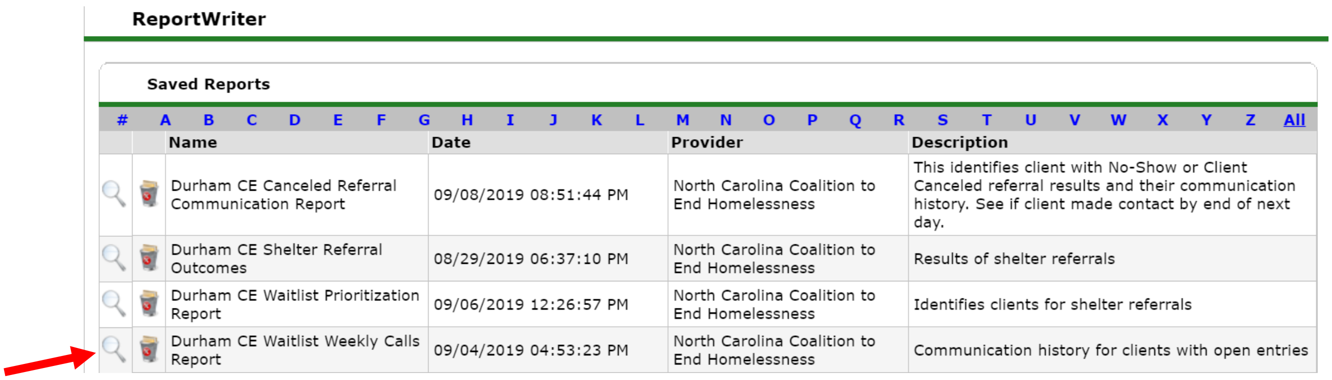
1. Click *Reports* from left hand menu.



2. Scroll to the bottom and click *ReportWriter* in the *Custom Reports* section.



3. Find the *Durham CE Waitlist Weekly Calls Report* and click the magnifying glass next to it.



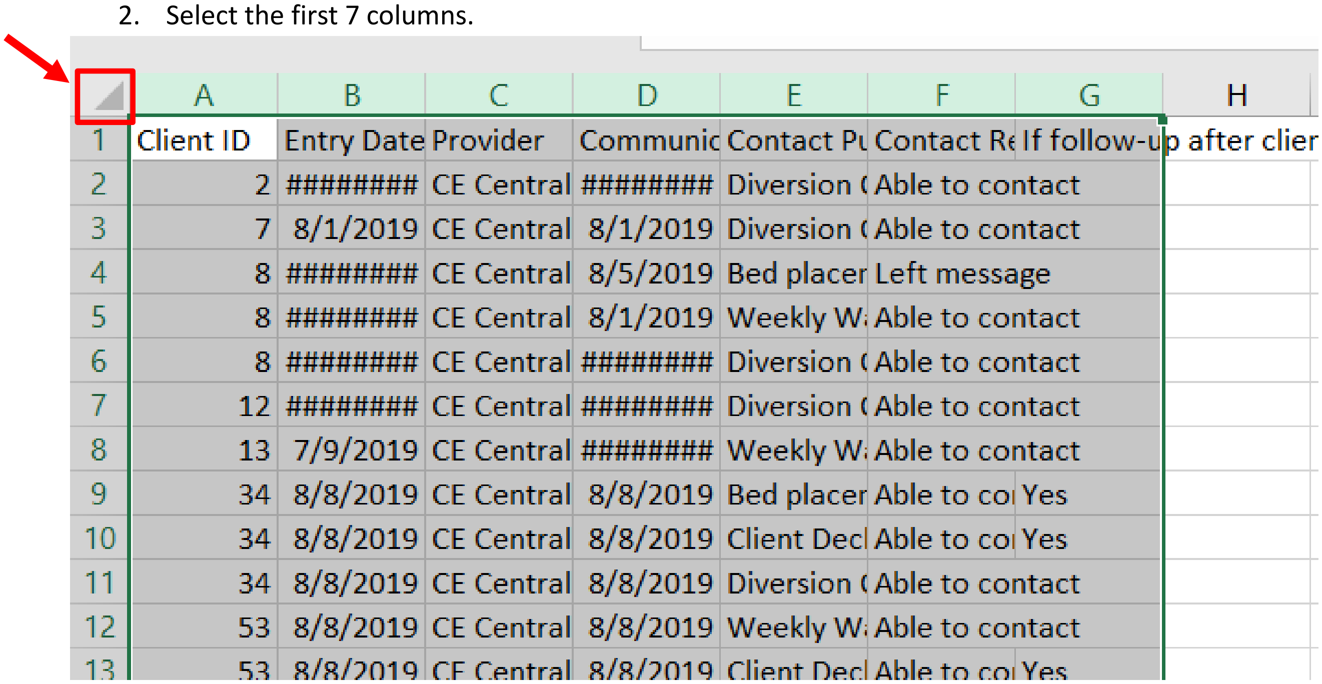
ReportWriter

Saved Reports

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

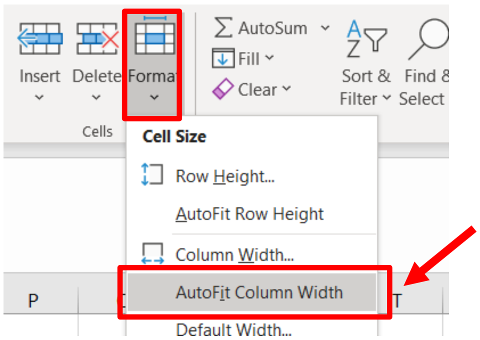
Name	Date	Provider	Description
Durham CE Canceled Referral Communication Report	09/08/2019 08:51:44 PM	North Carolina Coalition to End Homelessness	This identifies client with No-Show or Client Canceled referral results and their communication history. See if client made contact by end of next day.
Durham CE Shelter Referral Outcomes	08/29/2019 06:37:10 PM	North Carolina Coalition to End Homelessness	Results of shelter referrals
Durham CE Waitlist Prioritization Report	09/06/2019 12:26:57 PM	North Carolina Coalition to End Homelessness	Identifies clients for shelter referrals
Durham CE Waitlist Weekly Calls Report	09/04/2019 04:53:23 PM	North Carolina Coalition to End Homelessness	Communication history for clients with open entries

1. After downloading the report from ReportWriter open the excel document.
2. Select the first 7 columns.

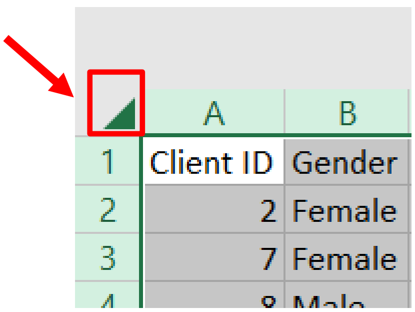


	A	B	C	D	E	F	G	H
1	Client ID	Entry Date	Provider	Communic	Contact Pu	Contact Re	If follow-up after clier	
2	2	########	CE Central	########	Diversion (	Able to contact		
3	7	8/1/2019	CE Central	8/1/2019	Diversion (	Able to contact		
4	8	########	CE Central	8/5/2019	Bed placer	Left message		
5	8	########	CE Central	8/1/2019	Weekly W	Able to contact		
6	8	########	CE Central	########	Diversion (	Able to contact		
7	12	########	CE Central	########	Diversion (	Able to contact		
8	13	7/9/2019	CE Central	########	Weekly W	Able to contact		
9	34	8/8/2019	CE Central	8/8/2019	Bed placer	Able to co	Yes	
10	34	8/8/2019	CE Central	8/8/2019	Client Dec	Able to co	Yes	
11	34	8/8/2019	CE Central	8/8/2019	Diversion (	Able to contact		
12	53	8/8/2019	CE Central	8/8/2019	Weekly W	Able to contact		
13	53	8/8/2019	CE Central	8/8/2019	Client Dec	Able to co	Yes	

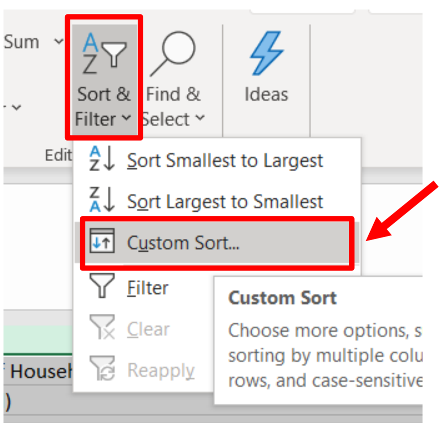
3. Click Format and then auto-fit column width



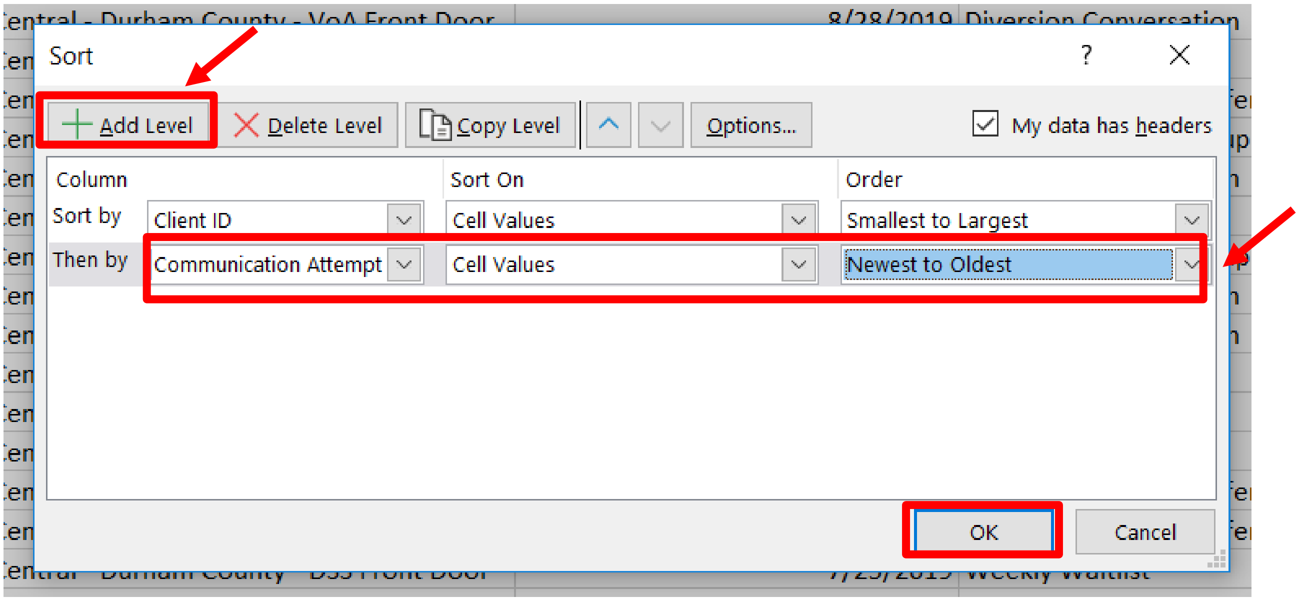
4. Click the triangle in the upper left corner of the cells to select the whole sheet.



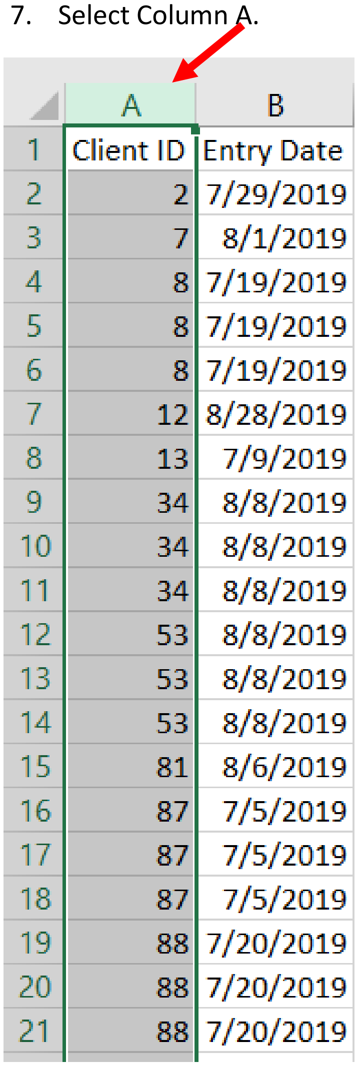
5. Click Sort & Filter and then Custom Sort



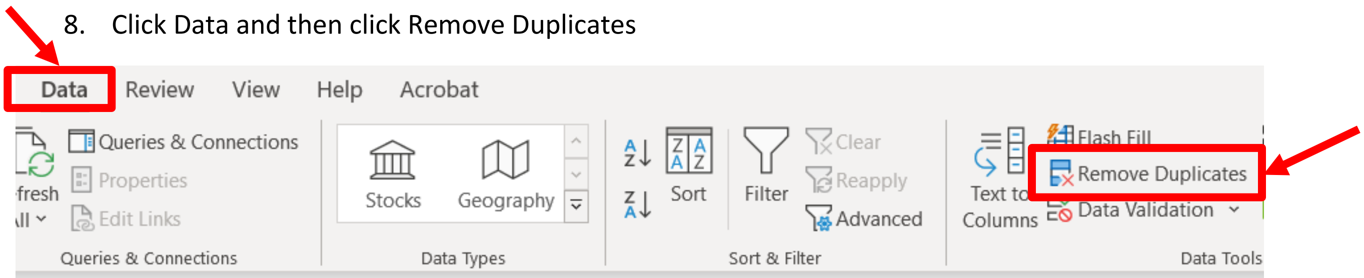
6. Fill in the fields to sort first by Client ID Smallest to Largest and then click Add Level to add a sort by Communication Attempt Start Date from Oldest to Newest to Oldest. Click OK.



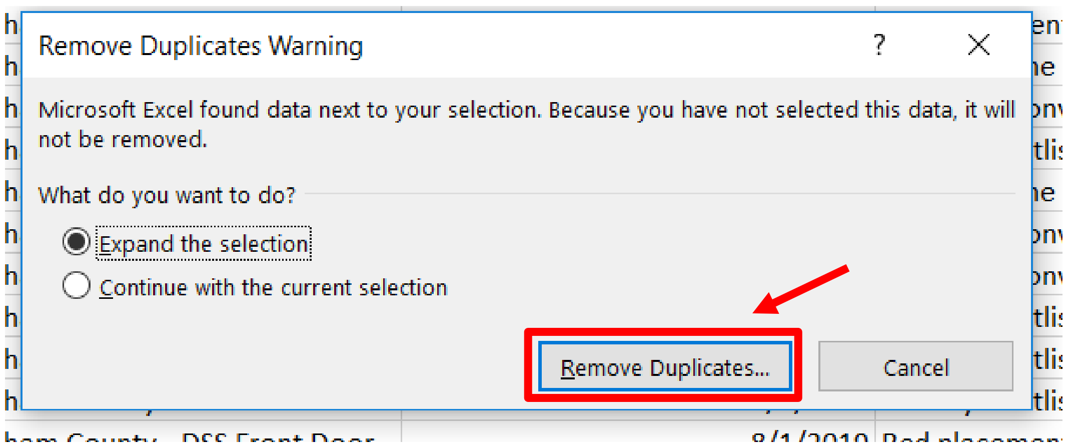
7. Select Column A.



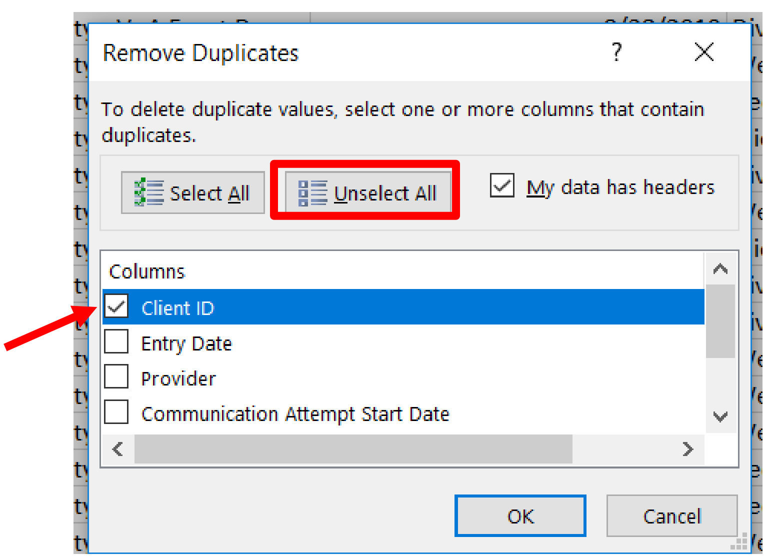
8. Click Data and then click Remove Duplicates



9. Select Expand the selection in the Remove Duplicates Warning that pops up then click Remove Duplicates

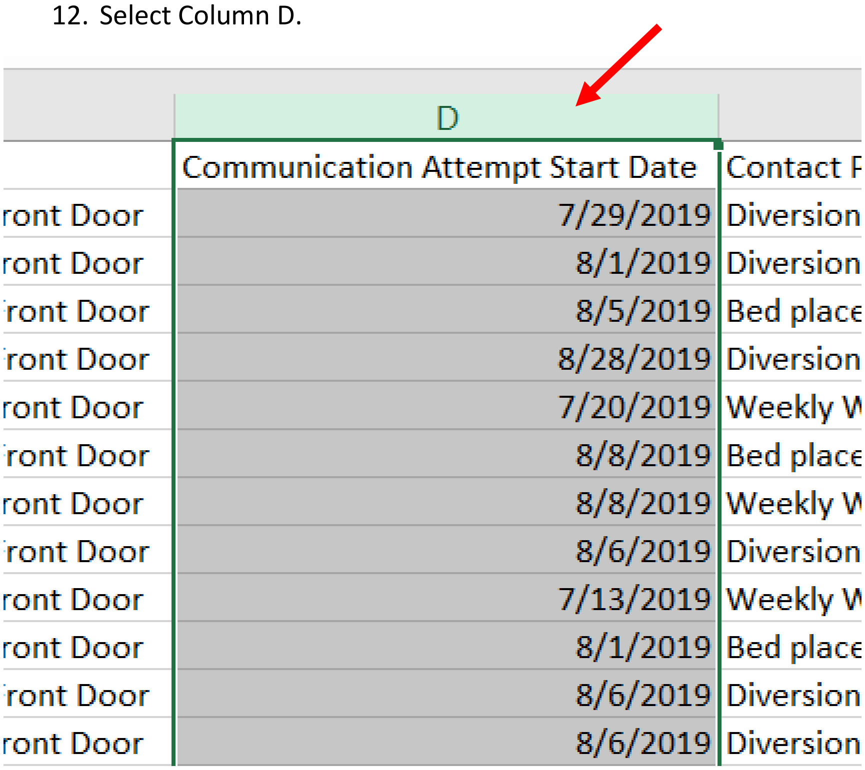


10. In the Remove Duplicates box that pops up click Unselect All then click the box next to Client ID.

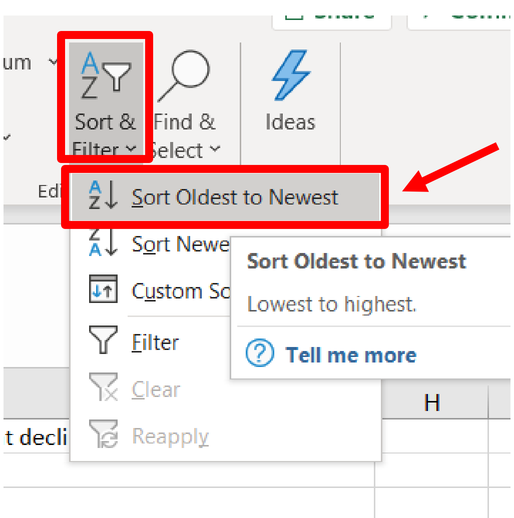


11. Each client now only has their most recent contact on the report.

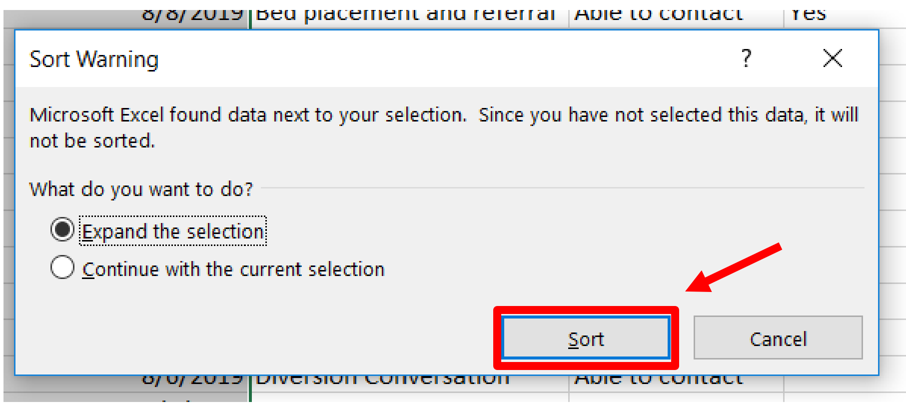
12. Select Column D.



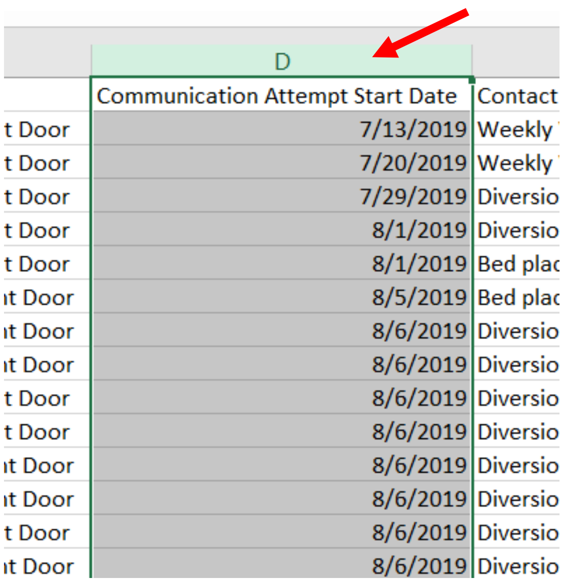
13. Click Sort & Filter then click Sort Oldest to Newest.



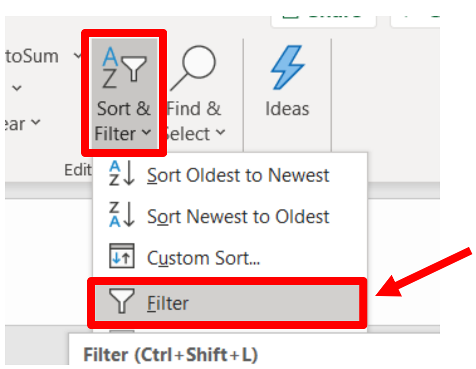
14. In the Sort Warning box that pops up select Expand the selection and click Sort.



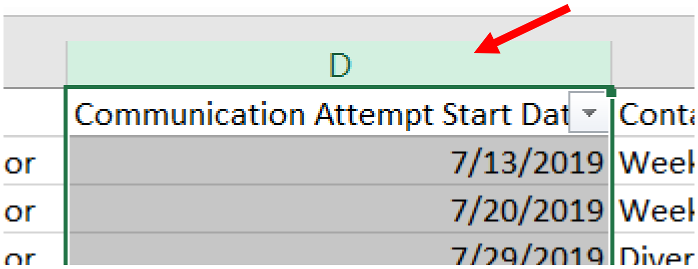
15. The clients that have the oldest contact are now at the top of the list and the most recently contacted are at the bottom. Review this list for the clients not yet contacted this week or per the policies and procedures.
16. If you'd like you can filter out contacts made this week to assist. Select column D.



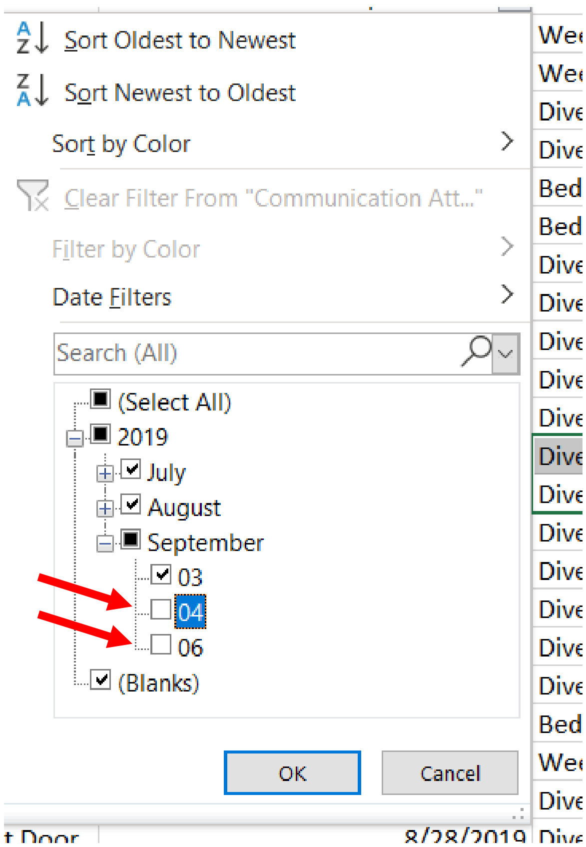
17. Select Sort & Filter and then click Filter



18. Click the box with the arrow that appears in the cell at the top of the column



19. Uncheck the boxes next to the dates that you want to filter out (this week's dates) then click OK.



20. The report now contains all the clients that have not been contacted this week (or whatever dates you chose).

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Section: Case Management Type A (Temporary Diversions)

Entry Point should regularly provide case management to households that were diverted to a temporary diversion destination (less than four months). This is called Case Management Type A

Each case manager will have a caseload, determined by the Entry Point Coordinators. Case management will be tracked on every staff'sHMIS dashboard.

1. Look at dashlet on HMIS Home screen for clients with scheduled communication this week.
2. Record outcome of case management communication on the *Entry/Exit* tab under *Follow Up* column.

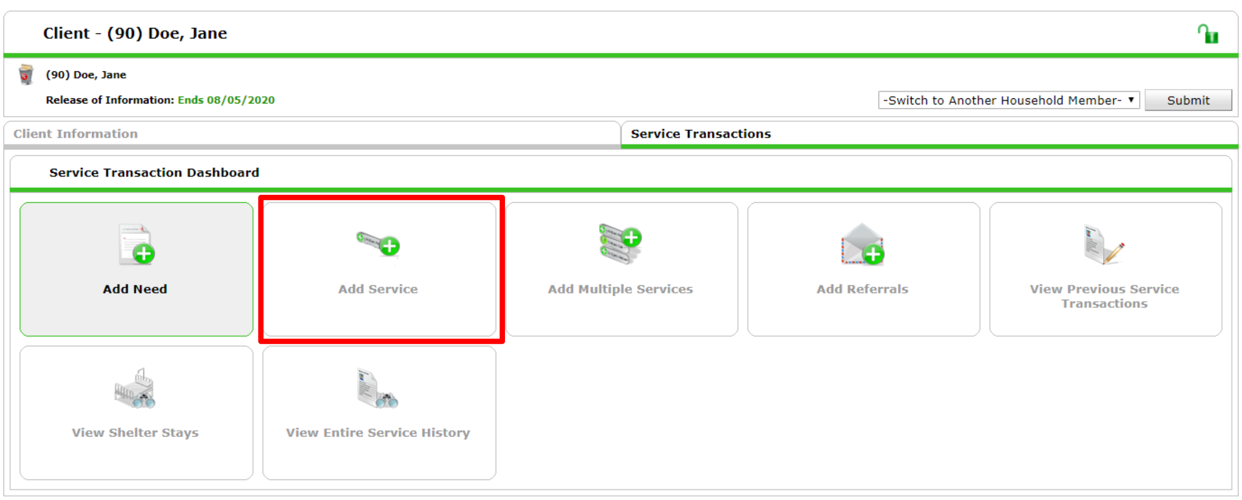
Record Case Management Follow-up

Communication attempts and engagement results after a client's exit are called *Follow Ups* in HMIS under the *Entry/Exit* tab. Planning future communication with a client is called *Project Follow-up* within Service Transactions. Both types of "Follow Ups" are used in the HMIS workflow when clients are supported after a Entry Point exit (i.e. leaving the Shelter Waitlist).

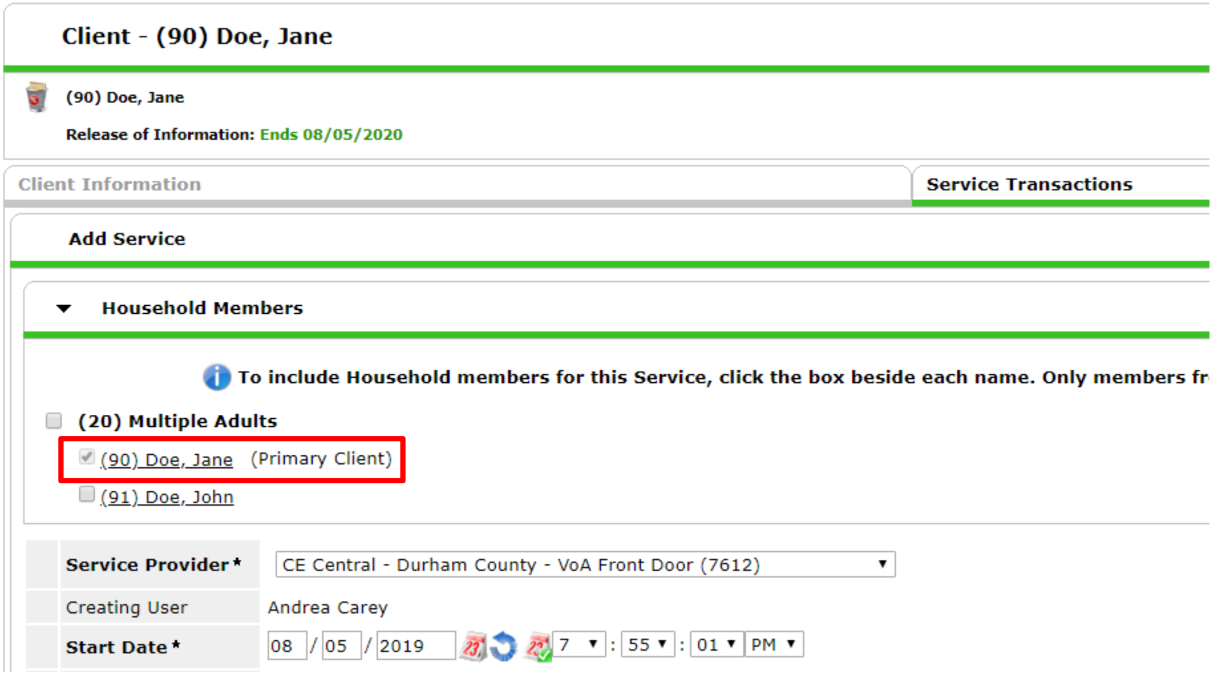
Schedule the next Communication

b. After recording the Front Door project exit, go to *Service Transaction* tab

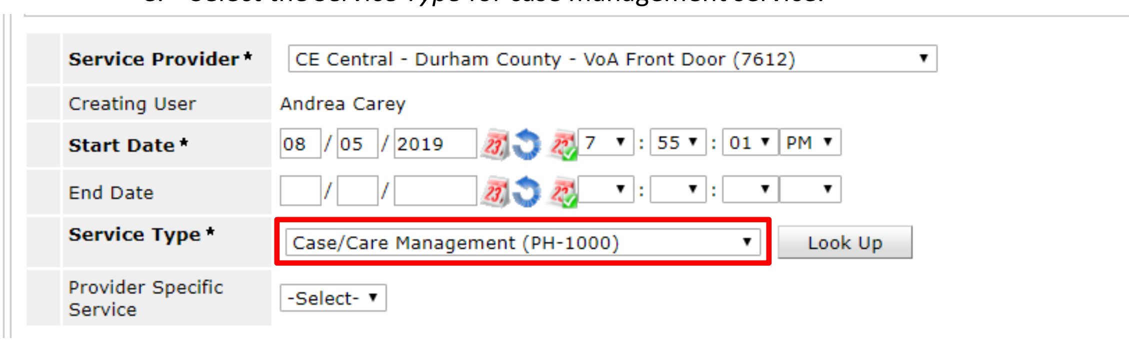
c. Select *Add Service.*



d. Only select the *Head of Household* in the *Household Members* section (since you're going to follow-up one household at a time).



e. Select the *Service Type* for case management service.



f. Click *Save & Continue.*

g. Scroll to the *Follow Up Information* section.

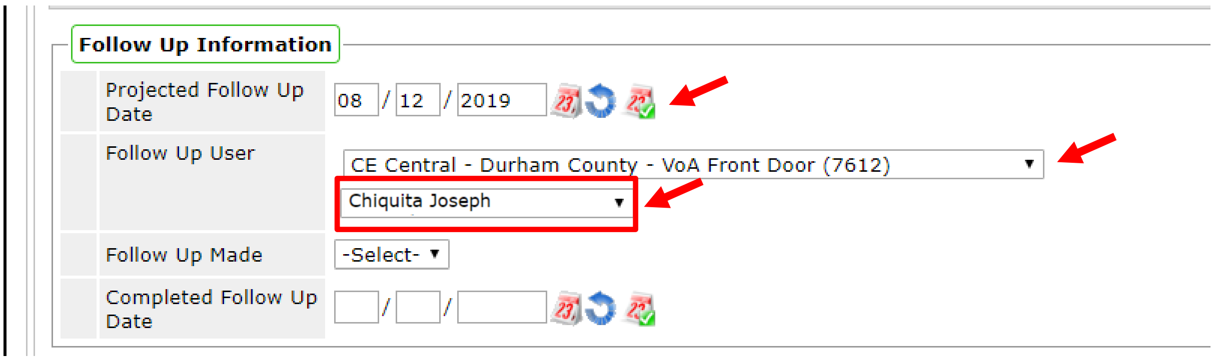
h. Identify the follow-up date if one was selected with the client.

   i. If a specific date was not agreed to, select a day for the correct week (weeks based on Monday-Sunday, particular day of week does not matter)

i. Complete *Follow Up User* information.

   i. First identify the home project (or Default EDA mode) for the user. Most staff will be listed under *Entry Point – Durham County*.

   ii. Then select the name of the staff from the list.



j. Under *Need Information*, mark the *Need Status* as *Closed* and the *Outcome* as *Fully Met* for today's case management.

k. Click *Save & Exit.*

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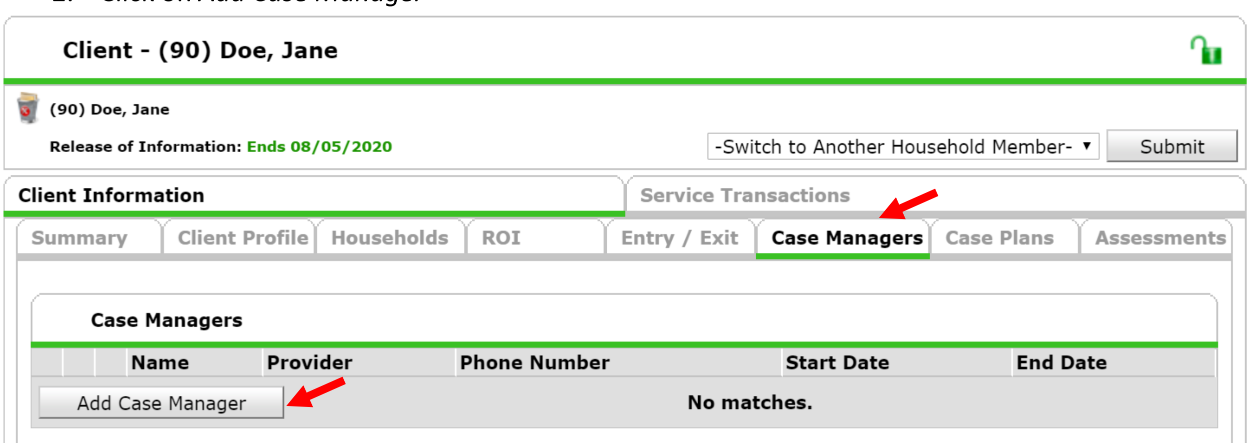
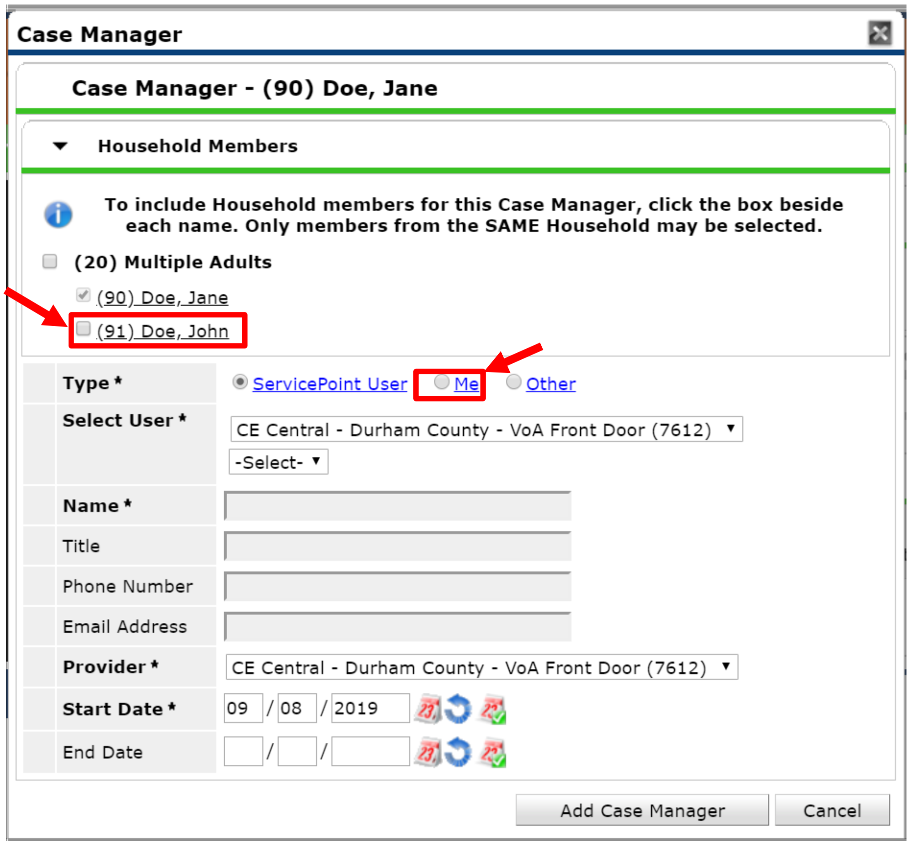
Add a Case Manager

1. Click on the *Case Managers* tab
2. Click on *Add Case Manager*



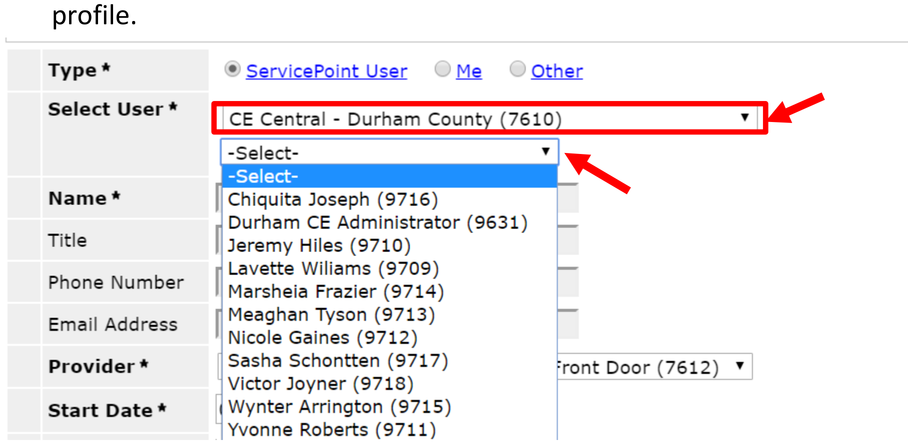
a. Check the box of all current *Household Members* so that no matter which client is selected, the correct staff member will appear.

b. If the Case Manager will be you, select *Me* as the *Type*



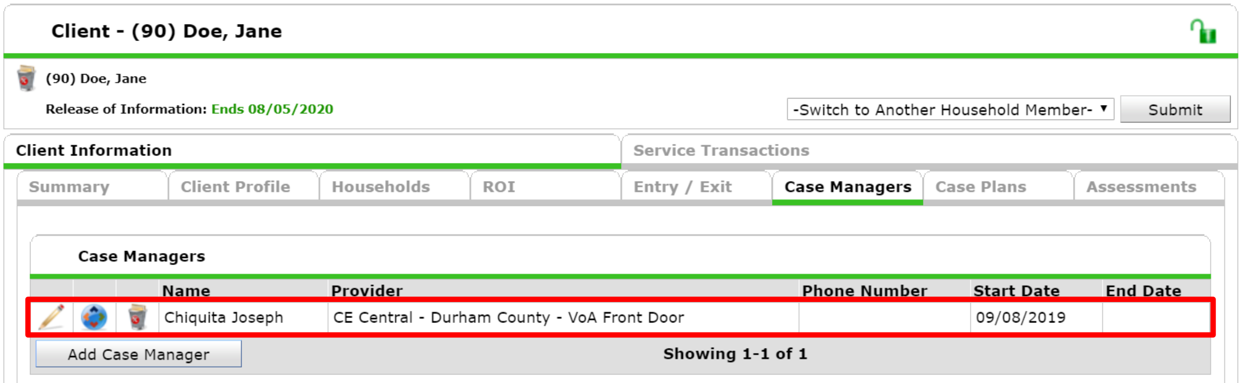
c. If the Case Manager will be another Entry Point staff member, keep *Type* as *ServicePoint User.*
   i. Next, change the *Select User* dropdown to the *Entry Point – Durham County* project where staff are assigned.
   ii. Then, select the name of DSS or VoA staff who is the client's Case Manager.

d. Contact information will automatically appear if it is connected to the staff's HMIS profile.



e. *Provider* will list your current EDA mode. Keep that to confirm the agency staff work for.

f. Click *Add Case Manager* to save.



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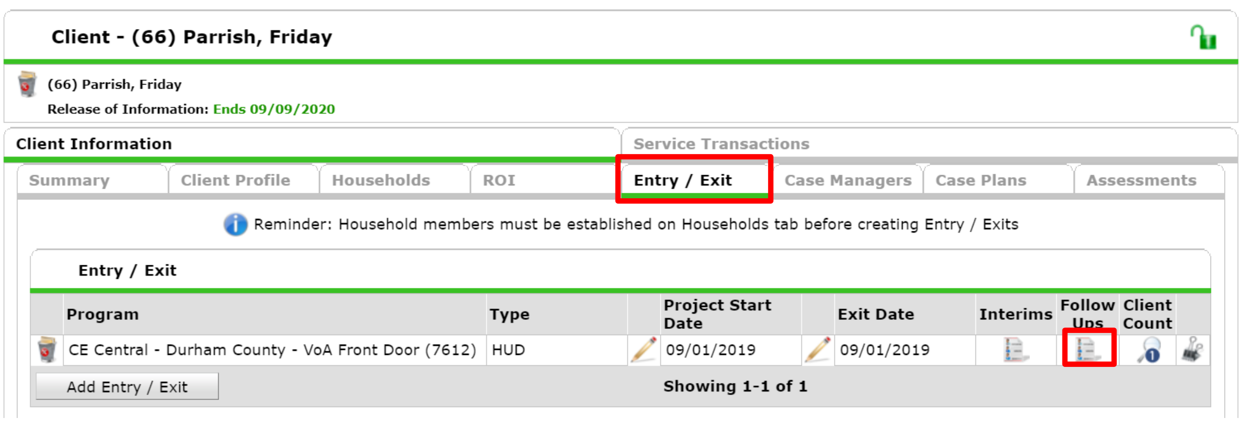
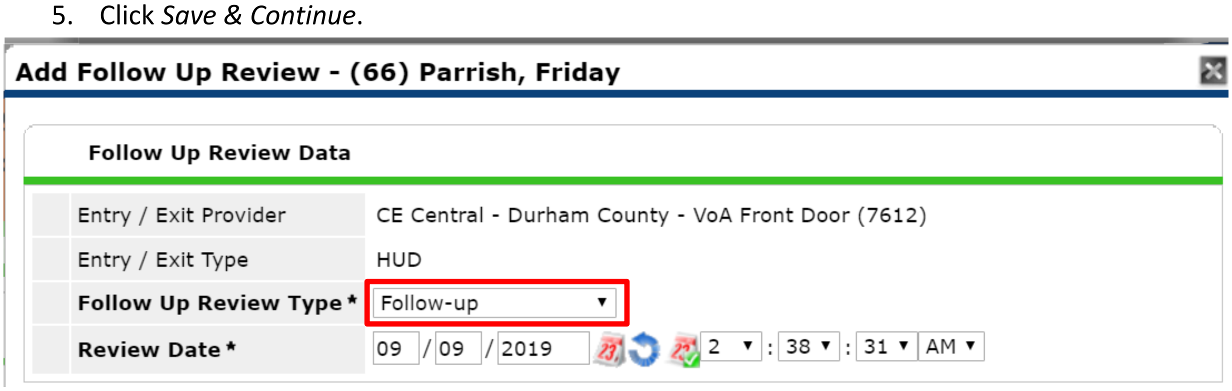
When a Case Management after Exit is completed

1. Once logged into HMIS, confirm Enter Data As (EDA) for the correct Front Door project.
2. Go to *ClientPoint* to find the Head of Household.
3. Go to the *Entry/Exit* tab.
    a. Click on the notepad icon under *Follow Ups*.
    b. Click on *Add Follow Up Review.*

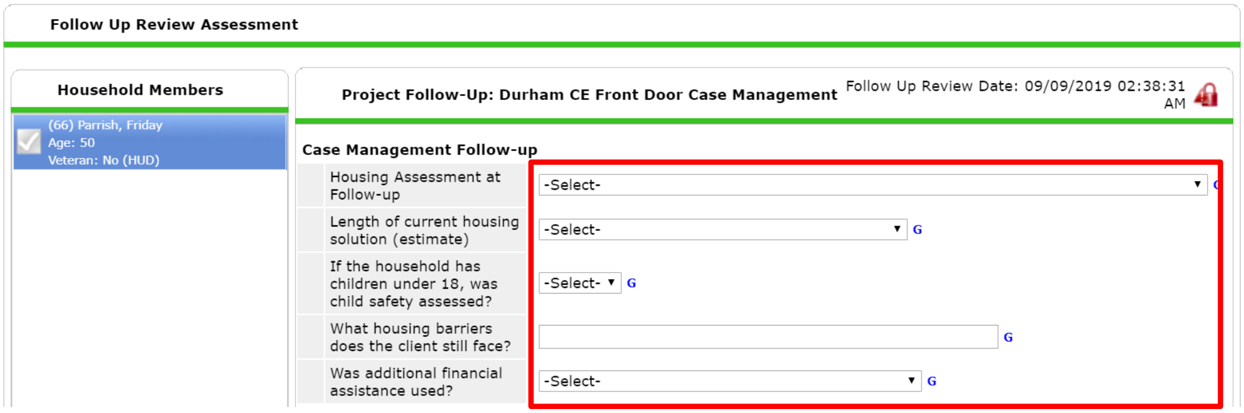


4. Add the *Follow-Up Type* as *Follow Up.*
5. Click *Save & Continue*.

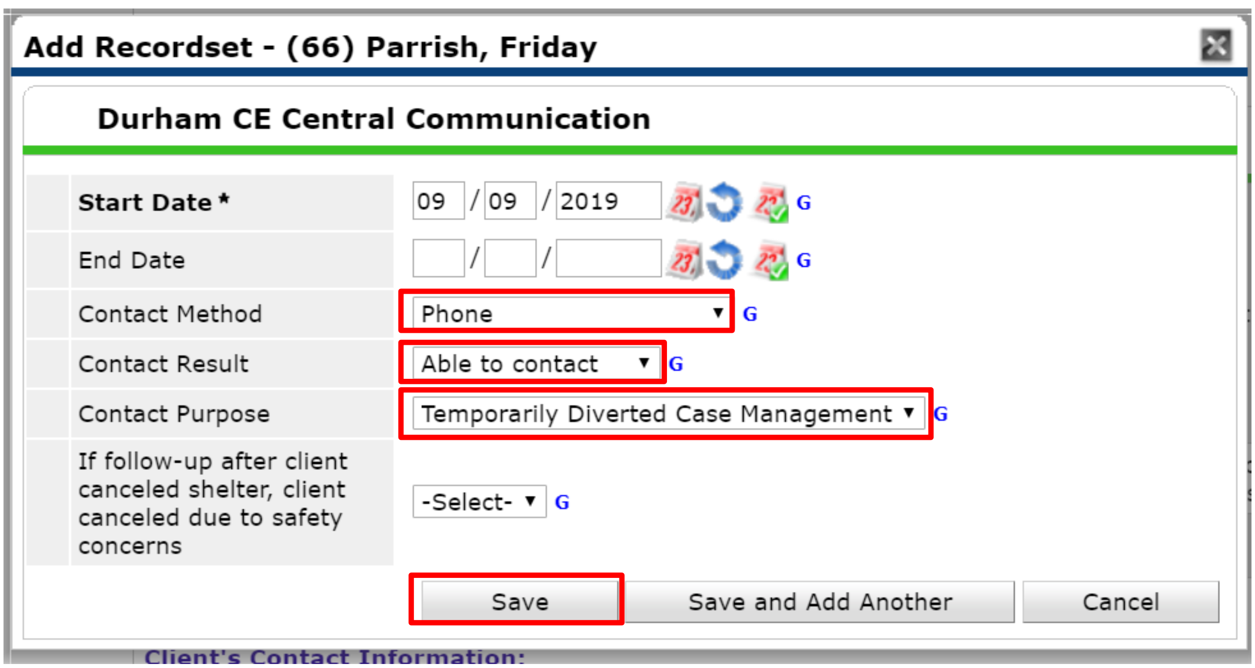


6. If the client was reached, record client responses to the *Case Management Follow-up* section.

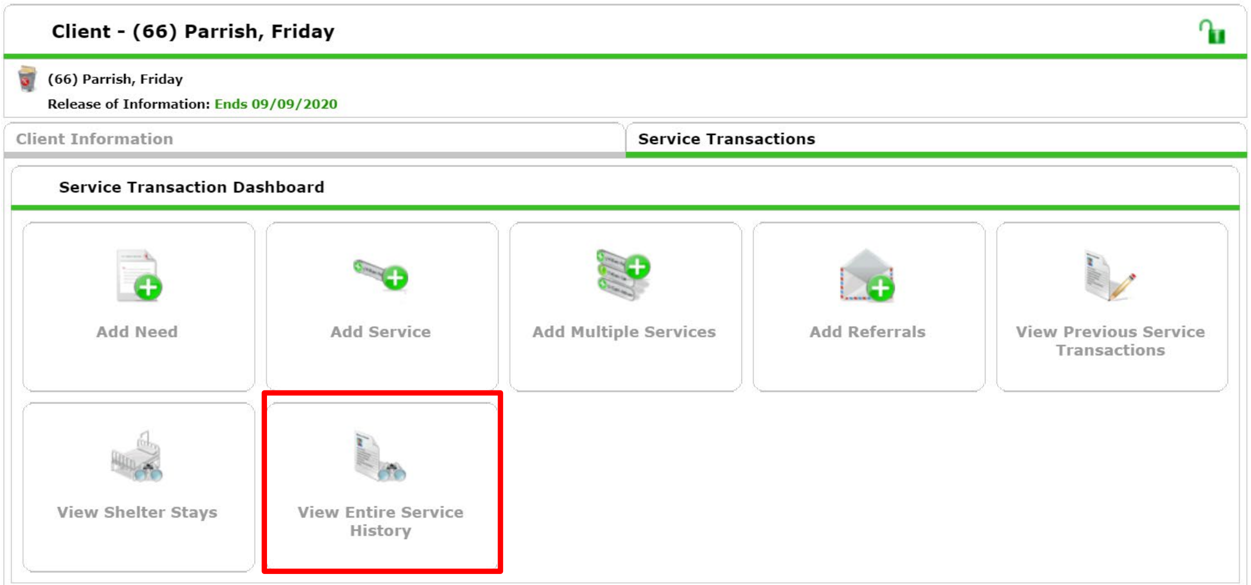
a. The questions within this section are almost identical to the Interim and Exit Assessments, except that they refer to the client's experience after their diversion conversation.



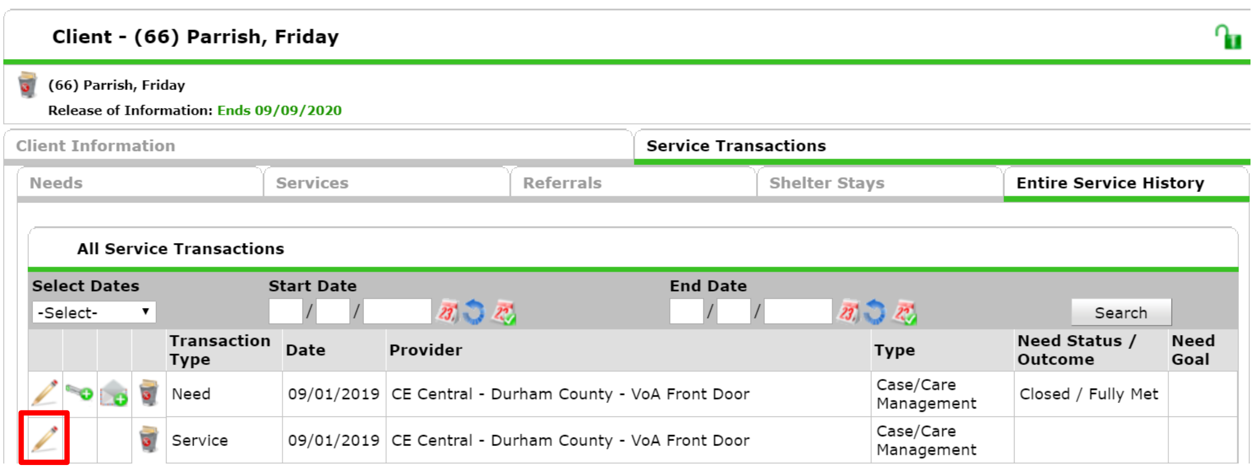
7. Update the *Client Resources* section next. Ask for current income and non-cash benefit levels and update appropriately.
8. At the bottom, complete the *Communication* sub-assessment with the results of this Follow-up communication.



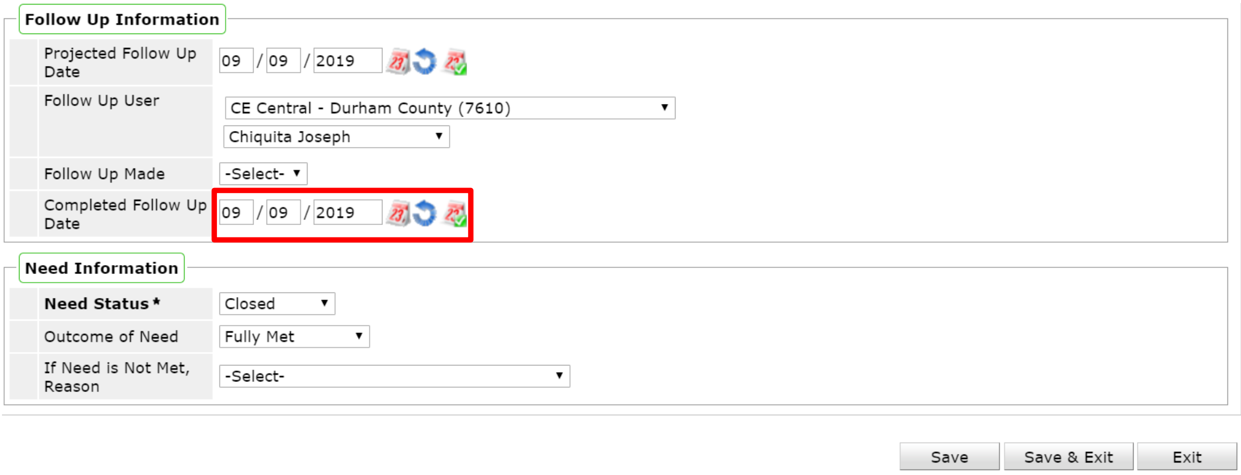
9. If the client was not successfully contacted, continue to reach out to them at your discretion.
10. If the client was successfully contacted, record the *Completed Follow-Up Information* in the previous *Service* Transaction.
    a. Go to *Service Transaction* tab.
    b. Select *View Entire Service History*



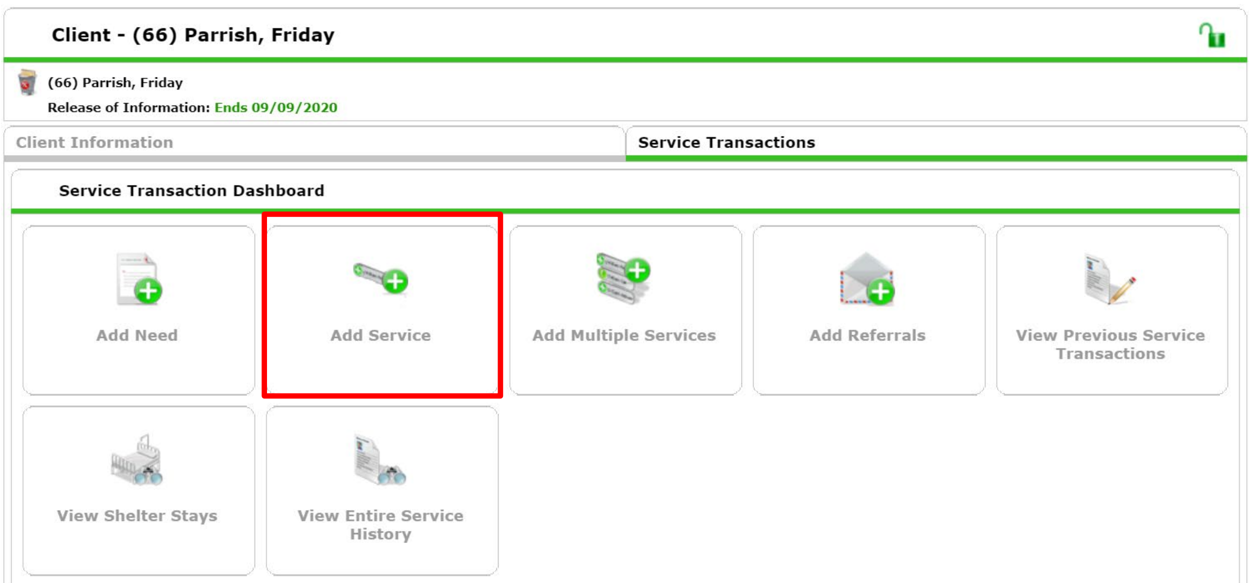
c. Find the Service recorded on the date of the client's last communication with you.
    i. Click the pencil icon next to that date.



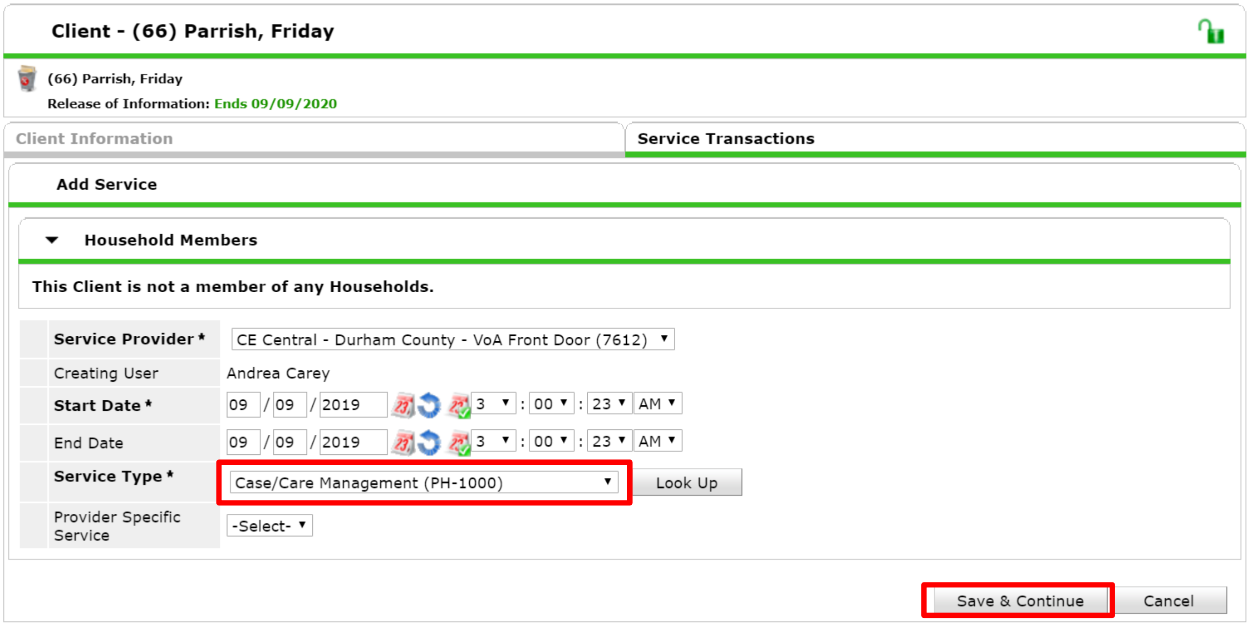
d. Scroll down to the *Follow Up Information* section.
e. Add the accurate date for the completed follow-up.
f. Click *Save & Exit*.



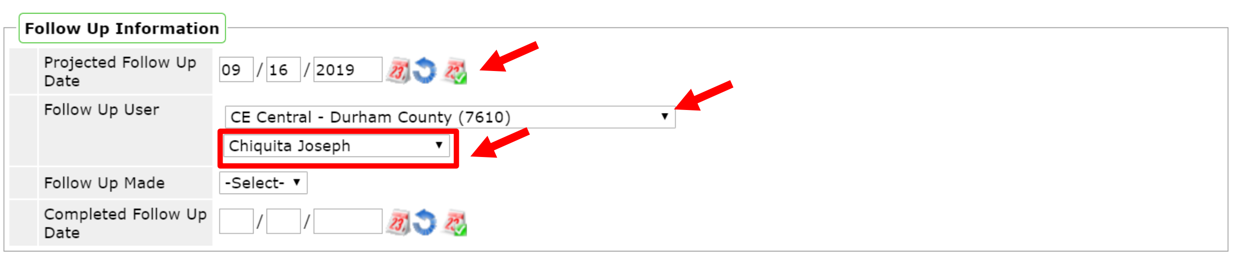
11. Then schedule the next Follow-up (attempt to follow-up until the client has greater stability, at your discretion).
    a. Select *Add Service.*



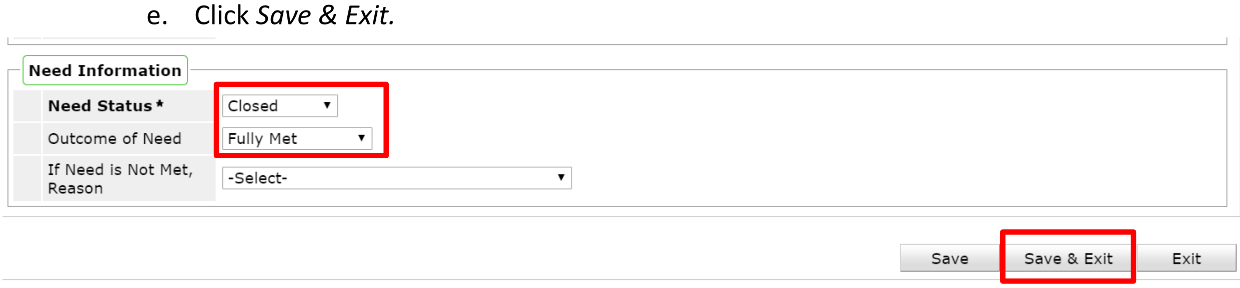
    b. Select *Case Management* as the Service.
    c. Click *Save & Continue*.



a. Scroll to the *Follow Up Information* section.
b. Identify the follow-up date if one was selected with the client.
    i. If a specific date was not agreed to, select a day for the correct week (weeks based on Monday-Sunday, particular day of week does not matter)
c. Complete *Follow Up User* information.
    i. First identify the home project (or Default EDA mode) for the user. Most staff will be listed under *Entry Point – Durham County*.
    ii. Then select the name of the staff from the list.



d. Under *Need Information*, mark the *Need Status* as *Closed* and the *Outcome* as *Fully Met* for today's case management.
e. Click *Save & Exit.*



12. Repeat steps as needed.

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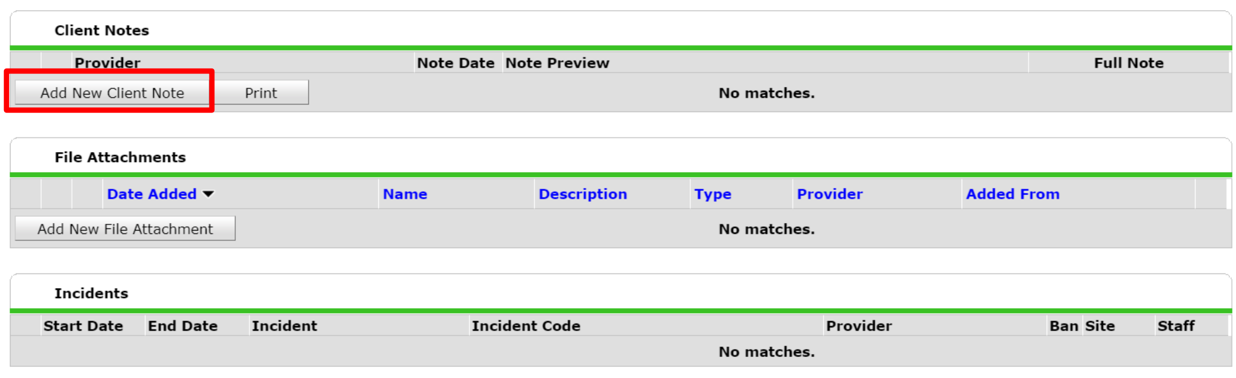
Section: Client Notes

There are three main ways to record notes from your engagement with the client or household. Notes will be visible within Entry Point but not to shelters.

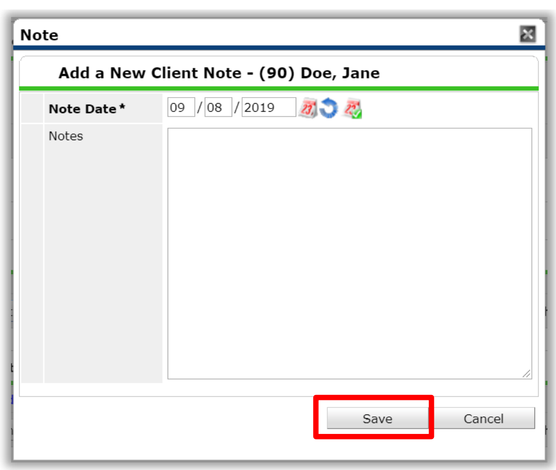
Add Client Notes to *Client Profile*

One way to record notes is available on the *Client Profile* tab

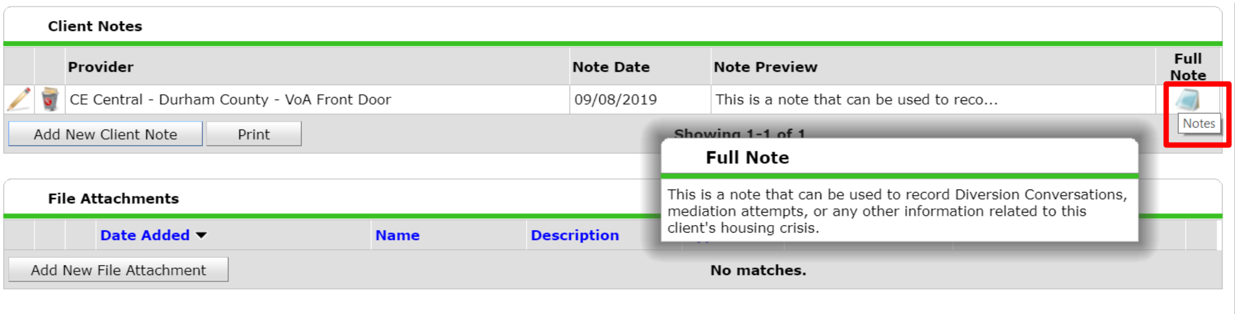
1. Once logged into HMIS, confirm Enter Data As (EDA) for the correct Front Door project.
2. Go to *ClientPoint* to begin searching for the Head of Household.
3. Scroll to the *Client Notes* and select *Add New Client Note* to record a new note.



   a. Confirm the *Note Date* is accurate.
   b. Type in your notes.
   c. End the note with your initials.
   d. Click *Save*



4. Hover over the *Full Note* icon for a view of the complete note.



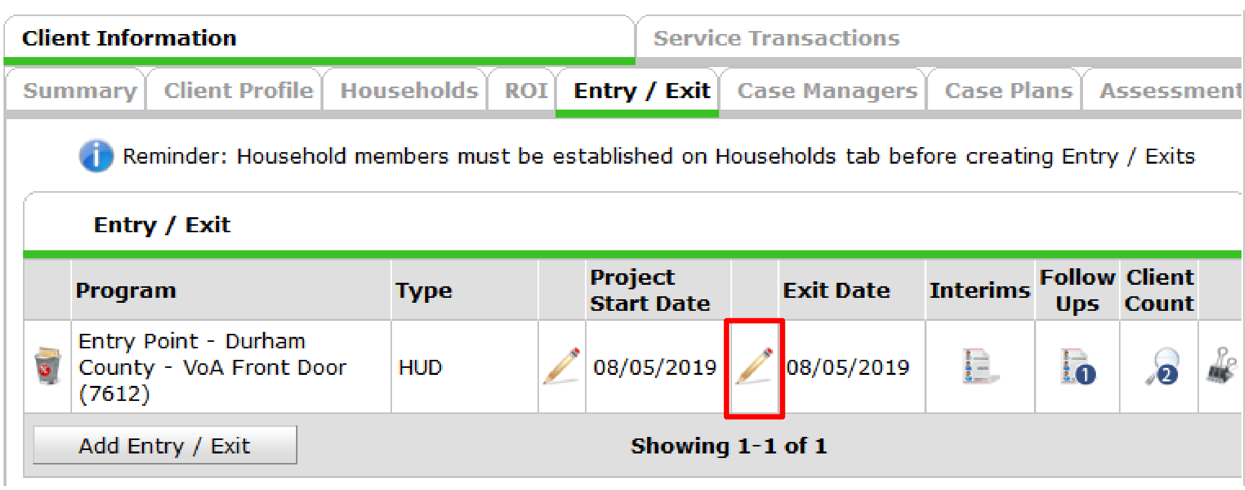
Add Case Notes to *Goals*

One way to record notes for Entry Point only is on the *Case Plan* tab after a goal is added.

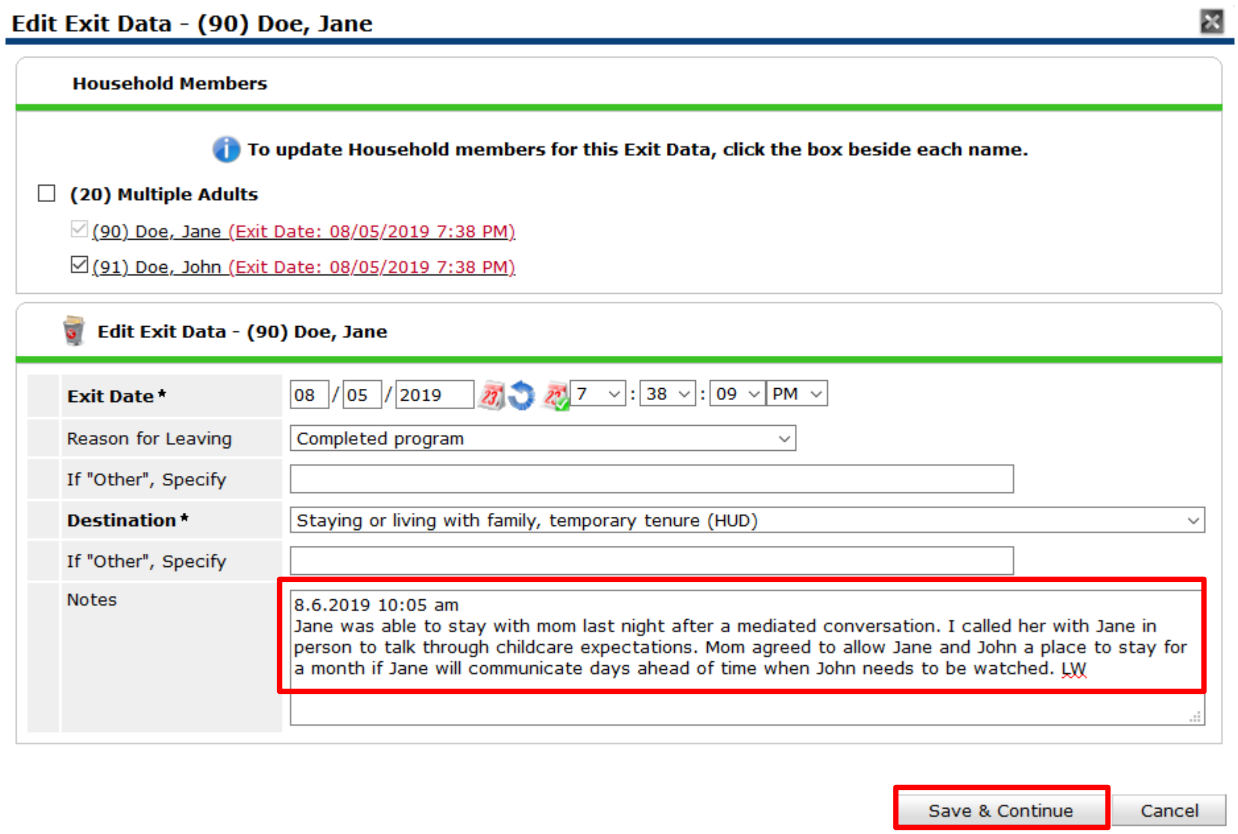
Add Case Notes to *Exits*

When a client leaves the Entry Point project, details about the exit can be saved near the *Reason for Leaving* and *Exit Destination*.

1. Once logged into HMIS, confirm Enter Data As (EDA) mode for the correct Front Door project.
2. Go to *ClientPoint* to search for the Head of Household.
3. Once on the Head of Household's *Profile* tab, go to the *Entry/Exit* tab
4. Click on the Pencil icon for *Exit Date* as if completing the project's exit
5. Beneath *Exit Destination*, use the *Notes* box for details about the client's exit



6. Make sure they are properly formatted
   a. New notes will go above the previous notes
   b. The first row of the note will be the Date and Time
   c. The second row will be the note information and your initials
7. Select *Save & Continue* to add the notes



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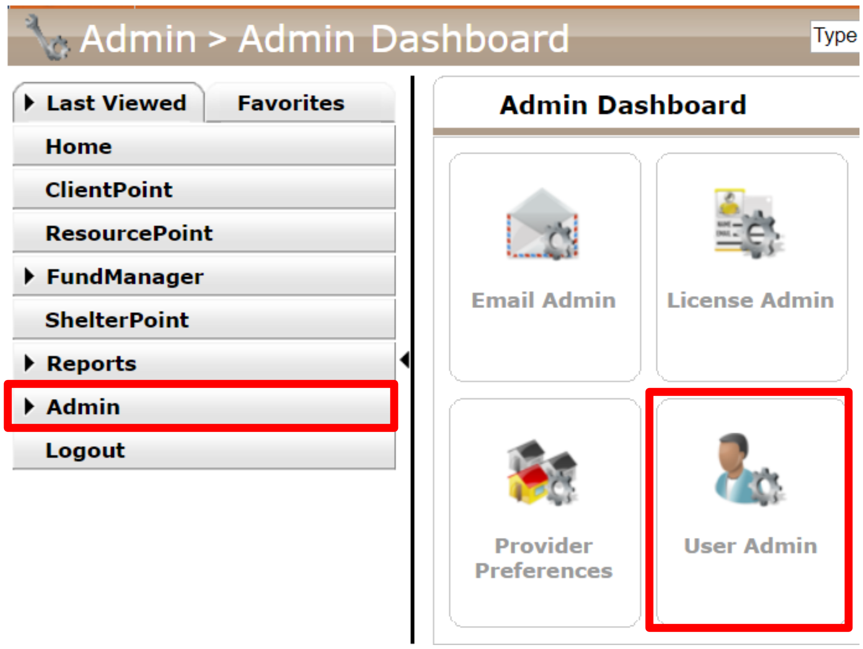
Section: De-Identify Client Records and Locking Searchability in HMIS

De-Identify Client Records

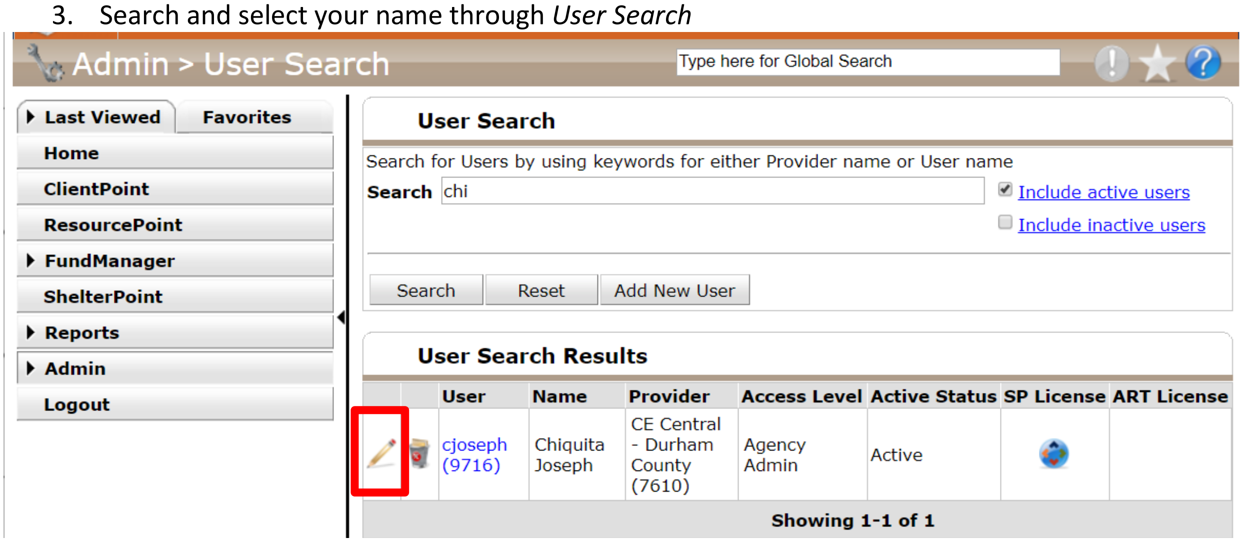
If there are safety concerns for the client within the HMIS, staff can create an Unnamed Client profile to de-identify the client's information before HMIS intake is completed. A coded series of numbers after "Unnamed" will substitute for the client's name.

In HMIS:
Switch your HMIS License to manage only Unnamed Clients.

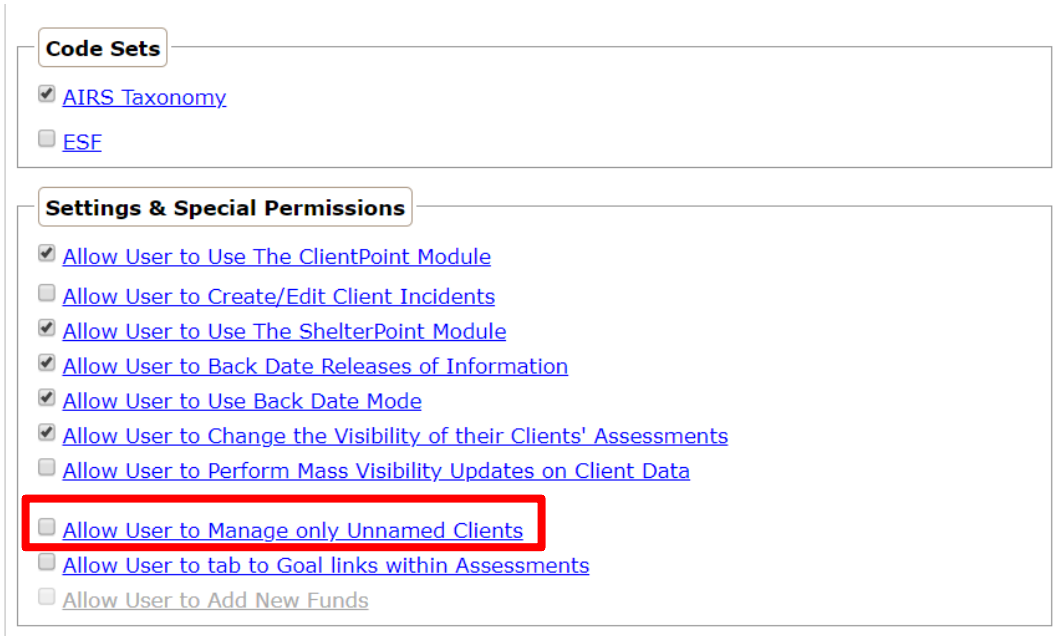
1. Go to *Admin* on the left-side menu
2. Select *User Admin*



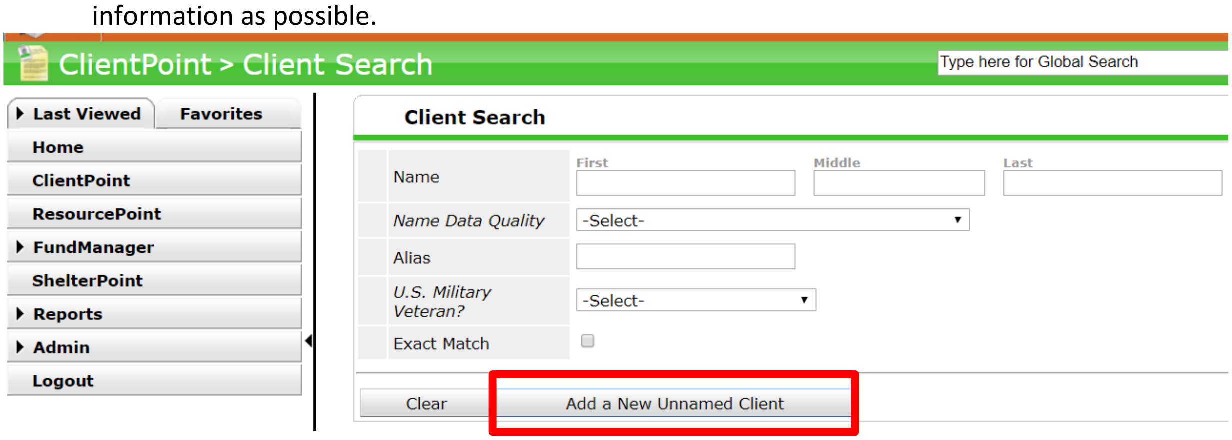
3. Search and select your name through *User Search*



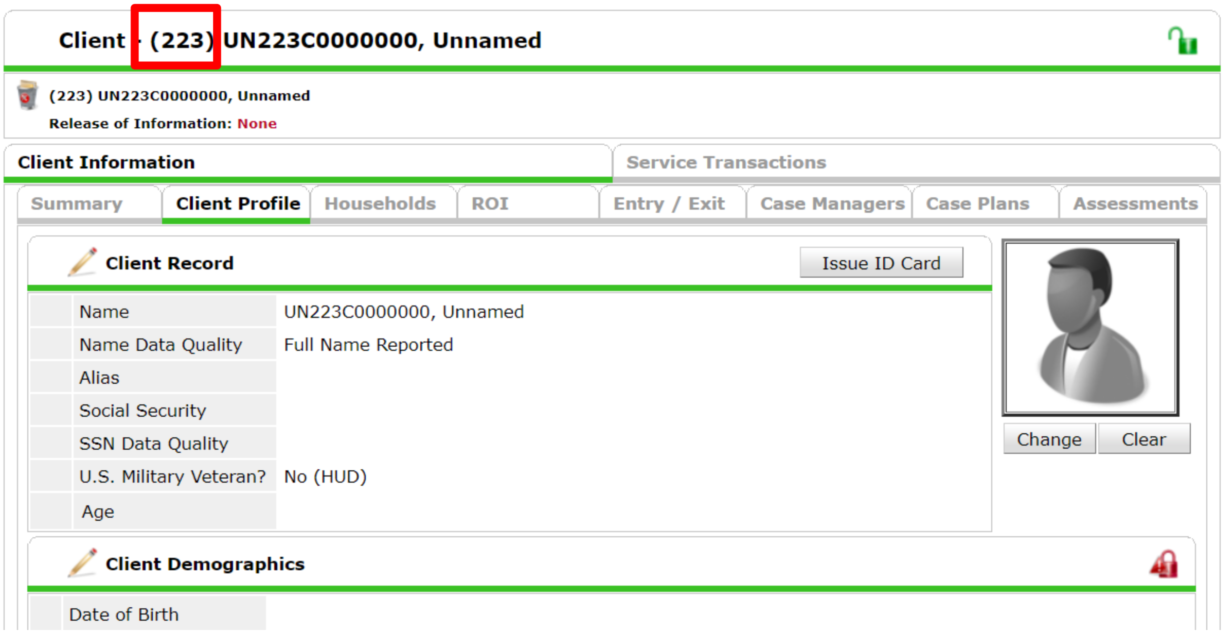
4. Scroll down to the Settings & Special Permissions section and check the box to *Allow User to only Manage Unnamed Clients*. Then *Save & Exit*.



5. Now to go *ClientPoint* to create the client's and/or household's protected profile with as much information as possible.



6. Immediately save and secure a reference to the client's ID number. You will not be able to search for the client by name in HMIS, only by this ID number.
7. Continue with the client's profile and household as you would usually. The eROI will be marked No to signify the protected nature.



8. Once data entry is complete for this client, go back to *Admin* > *User Admin* to return your HMIS License to normal by unchecking *Allow User to only Manage Unnamed Clients*. Then *Save & Exit*.

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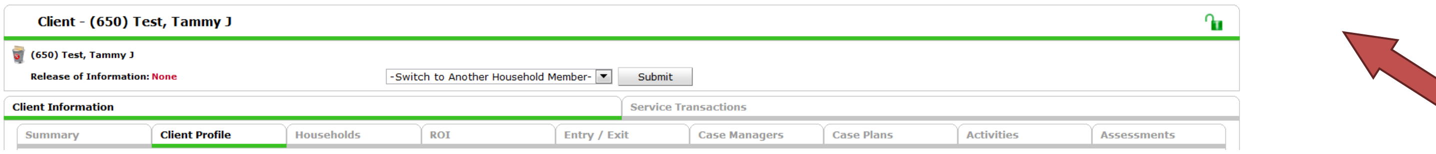
Lock Searchability of Client

If the client only requests that their name and other identifying information not be searchable in HMIS@NCCEH, adjust their profile's Visibility to protect their data. (This will allow duplicate profiles to be created.)

1. Use the *ClientPoint* search screen to locate the client for whom visibility will be altered.

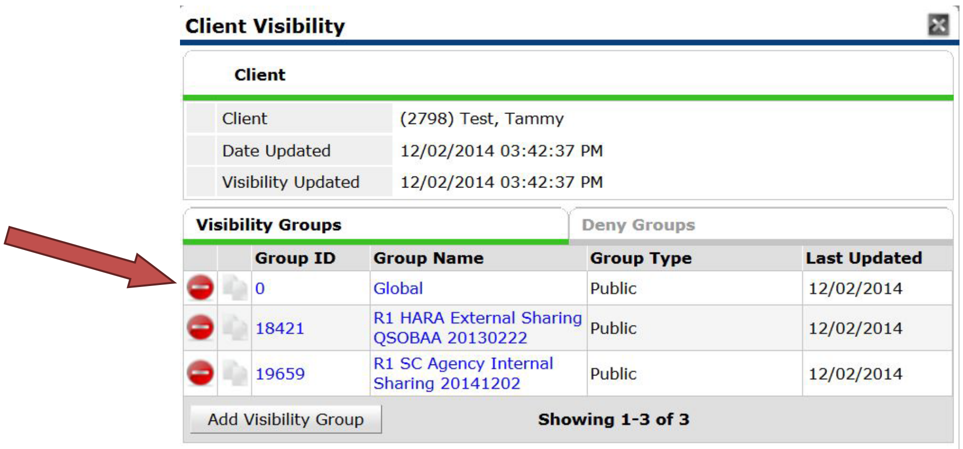
2. Click the client's name. The screen will refresh and display the **Client Profile**

3. Click the **Lock** icon to display the **Client Visibility** screen



4. Click the **Red Minus** icon next to ***'Global'*** *(if applicable)* so that providers outside the visibility (a.k.a. sharing) plan will no longer be able to locate or view the client's information in ServicePoint.

5. If applicable, click the Red Minus icon next to each External Provider Group included in the visibility (a.k.a. sharing) plan so those providers will no longer be able to locate or view the client's information in HMIS ServicePoint.
    a. It is important that the *Internal* visibility group remains intact. Removing the *Internal* visibility group will result in you locking yourself out of the client's record. If you do not see any internal sharing set up, contact the NCCEH Data Center for assistance.
    b. If the *Front Door* sharing group is removed, you will lock out the community shelters from seeing this client and any referrals. If the client requests one agency to not have access, contact the NCCEH Data Center.



6. Click the *Exit* icon to return to the *Client Profile*.

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Section: Behavioral Health Emergencies

Front Door Units must have a protocol in place for addressing situations in which a client is believed to be experiencing a mental health crisis or substance abuse crisis. If a Front Door Provider suspects but is unsure whether the client presents an immediate safety threat to themselves or others, the case worker may call Alliance Health's 24-Hour Access and Information Line with the client for assessment and assistance. Regardless of the result of the call, this referral should not interfere with referral to emergency shelter.

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Section: Data entry summary grid

Place for data entry	What it tracks	When to do it
Project Entry Assessment	Diversion conversation Special population screens Demographics/household data	At first contact with client, live during conversation
Project Exit Assessment	Why they exited (diverted, shelter refusal, no contact, successful shelter referral) Resources they received (DSS funds, diversion funds, other resources)	1. When diverted 2. When shelter confirms successful referral 3. by 10pm day following no-show 4. After 2 unsuccessful follow-up attempts 5. After 3 shelter intake no-shows in a row 6. When client indicates at follow up they no longer need/want shelter. 7. If client does not want shelter at all.
Interim Assessment and contacts sub-assessment	Dates of contacts Successful/unsuccessful contact On-going client needs/change in situation	1. While household still needs shelter/is open in the Entry Point Project. 2. If client makes contact after a no-show 3. When Entry Point follows up after a shelter decline by client 4. When Entry Point follows up weekly with everyone on wait list.
Follow-up Assessment and Contacts sub-assessment	Dates of contacts Stability of diversion situation On-going needs	Regularly, after every case management contact with temporarily diverted households.
Referrals	Date of referral Needs Outcome of referral	When referring a household to an open shelter bed
Service transactions/Fund Manager	Date of service Type of service Amount of funding provided Outcome of service?	When providing VOA diversion funds or referring a client to another diversion resource (DSS or outside resource)

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Section: Reporting Summary Grid

Type of report	What it tells you	How to use it	When you pull it
Referral Outcomes Report	Shelter referrals made to clients on the Waitlist Referral Outcomes and Reasons Referral Dates	Use to check all referrals have been resolved Use to check who needs contact from Entry Point Use to exit people from project if no further contact is needed	At least daily
Waitlist Prioritization Report	Clients on Shelter Waitlist Time on waitlist Priority number	Use to fill empty beds	At least daily
Waitlist Prioritization Report w/ Households	Clients on Shelter Waitlist Time on waitlist Priority number Clients in the same household Type of household	Use to fill empty family beds	As needed
Waitlist Weekly Calls list	Clients on Shelter Waitlist Dates of Communication Contact Result	Use to know who to call for weekly calls to shelter waitlist	At least weekly
Canceled Referral Communication Report	Clients on Shelter Waitlist Referrals Dates Referral Outcomes/Reasons Dates of Communication Contact Result	Use to know which clients did not communicate after they canceled referral and need waitlist exits.	As needed (two days after referrals)
Case Management Type A Dashlet	Who on your case load needs a follow up	Use to know who needs a call from your temporarily diverted clients	Refresh daily
Shelter Bedlist for Clients Served	Clients entered into HMIS for emergency shelters	Use to compare the Entry Point's Bed Placement project against shelter records	At least monthly

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