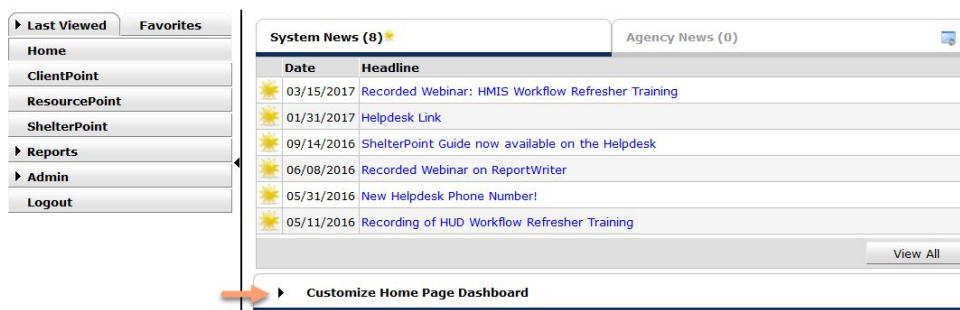


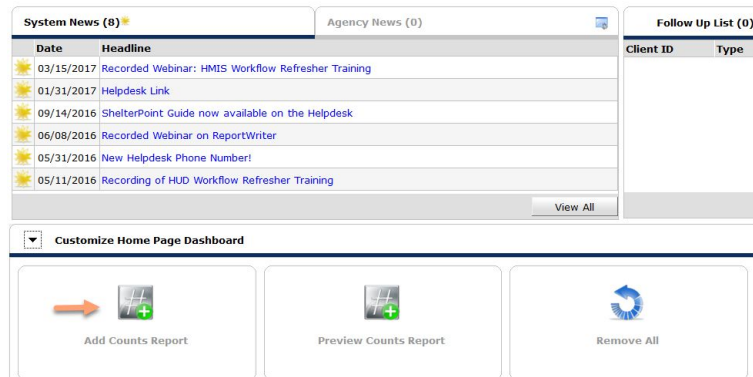
## Chicago Coordinated Entry System (CES) Homeless Management Information System (HMIS) Housing Provider Workflow

**Step 1:** Create a **Counts Report** to monitor **incoming referrals** to your project. Counts Reports are an easy way to manage the flow of referrals to your project. In addition, they provide a quick means of accessing the client record directly.

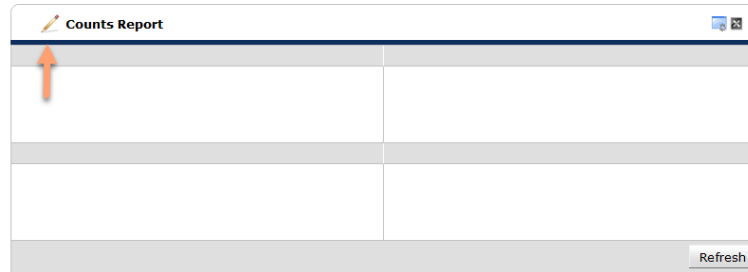
**A.** From the **HMIS Home Page**, click the  icon next to **Customize Home Page Dashboard**.



**B.** Click **Add Counts Report**.



- C. Click the  icon in the Counts Report Dashlet to bring up the settings.



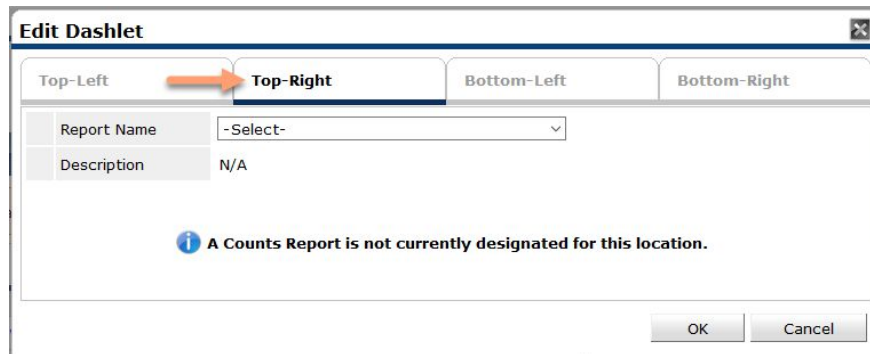
- D. Set the **ReportName** to **Outstanding Incoming Referrals**, set the **Dates** to **All Dates**, set the **Provider Type** to **Provider**, and set the **Provider** as the specific project that will be receiving referrals (i.e. All Chicago - PSH Project), then click **OK**.

**Note:** Please **do not** select the parent provider. For example, select **All Chicago - Transitional Housing Project** instead of **All Chicago**.

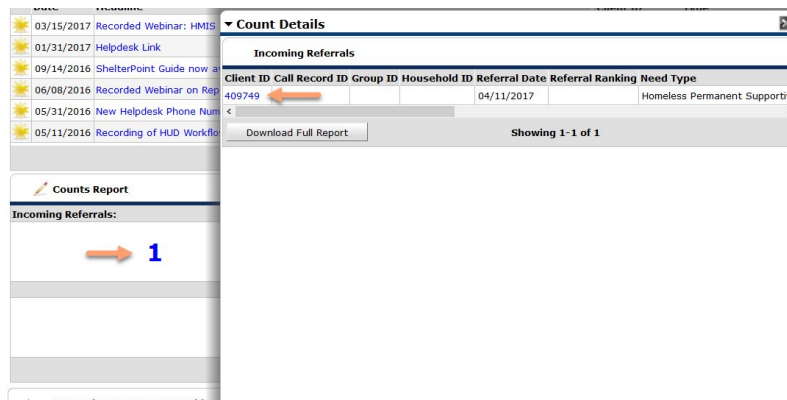
**Edit Dashlet** ✖

Top-Left	Top-Right	Bottom-Left	Bottom-Right
Report Name	Outstanding Incoming Referrals ▼		
Description	Lists all outstanding referrals made TO the specified providers during the specified date range. An outstanding referral is one that has not had a service provided, the need status is not 'Closed', the need outcome is not 'Fully Met', and the referral outcome is not 'Accepted', 'Declined', or 'Canceled'.		
<b>Filters</b>			
<b>Select Dates</b>			
All Dates ▼	Start Date	End Date	
	[ ] / [ ] / [ ]	[ ] / [ ] / [ ]	
<b>Provider Type *</b>	<input type="radio"/> System Wide <input checked="" type="radio"/> Provider <input type="radio"/> Reporting Group		
<b>Provider *</b>	All Chicago - CES PSH Project (1483)		<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Including Subordinates	<input type="checkbox"/>		
<input type="button" value="OK"/> <input type="button" value="Cancel"/>			


- E. You can display **4 different Counts Reports**. If you are receiving referrals for multiple projects, repeat **C** and **D**, while making sure to **change the position** of your report so as not to overwrite your previous reports.

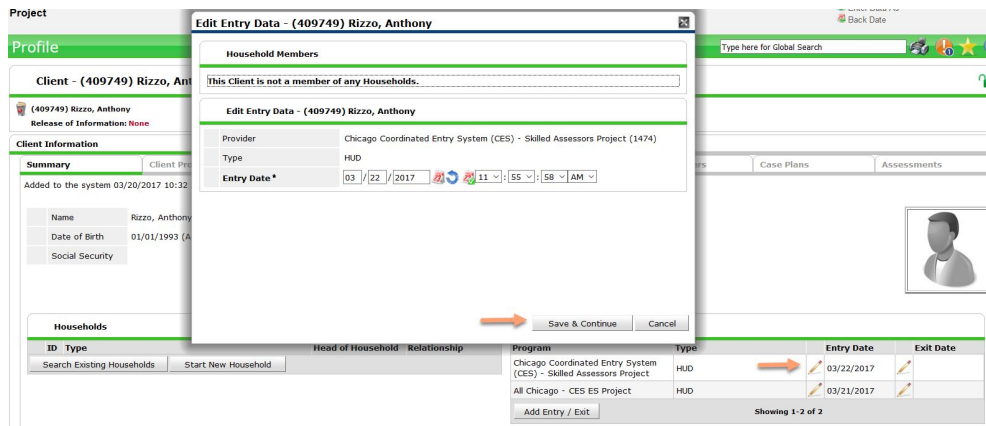


- F. Once completed, you will see the number of referrals your project has received. You can click the number to display the list of Client IDs corresponding to the individuals referred to your project, and click the Client ID to view the individual's Client Profile.



**Step 2:** View the **Assessment** data to gain **contact information** to begin to attempt to contact the client to complete an intake. View and download any **documentation** you need, which has been uploaded by a Skilled Assessor.

- A. When a referral is made to your project, the Matching Team will allow you to view the client's Assessment data gathered in the Chicago CoC Standardized Housing Assessment. On the **Client Summary Tab**, click on the  icon next to the client's entry into the **Chicago Coordinated Entry System (CES) Skilled Assessor Project**, and then click **Save & Continue**.



- B. Scroll down to view the client's assessment, but please **do not** change any data. View the client's contact information, and follow the **contact protocol** to get in touch with the client.

**Contact Information: Client**

Phone Number:  G

Email address:  G

Mailing address:  G

Are you currently enrolled in any social service programs?  G

If yes, which projects are you currently enrolled in?  G

If yes, what is the name of your current case managers?  G

If yes, what is the case manager's email address?  G

**Emergency Contact Information:**


Name:  G

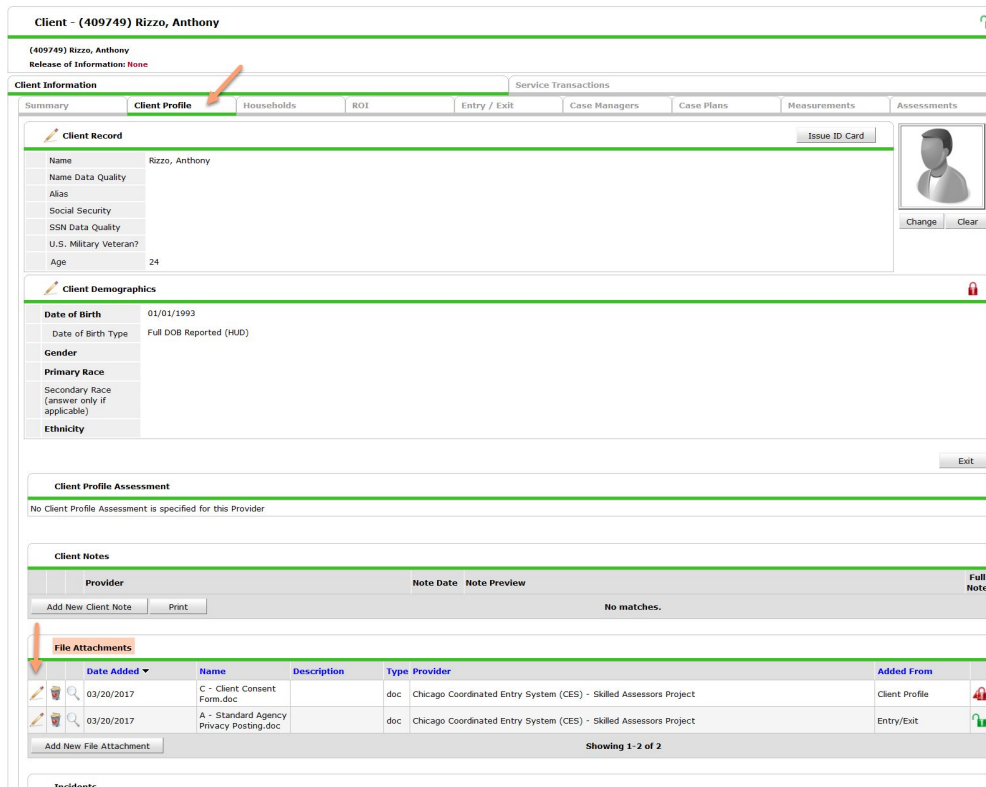
Contact number:  G

Relationship:  G

*Please share any way to contact you if a housing offer is available and the phone number we have for you is not working. This can include if you eat dinner at a specific place any night of the week, spend time at a library or attend any ongoing program.*

Notes on contacting client:  G

- C. To view **documentation** that Skilled Assessors have uploaded, returning to the **Summary Tab**, click the **Client Profile Tab**, scrolling down to **File Attachments**, and click the  icon next to the documentation you wish to download.



**Client - (409749) Rizzo, Anthony**

(409749) Rizzo, Anthony  
Release of Information: None

**Client Information** | Service Transactions

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

**Client Record** Issue ID Card

Name: Rizzo, Anthony  
Name Data Quality: [blank]  
Alias: [blank]  
Social Security: [blank]  
SSN Data Quality: [blank]  
U.S. Military Veteran?: [blank]  
Age: 24

**Client Demographics** Exit

Date of Birth: 01/01/1993  
Date of Birth Type: Full DOB Reported (HUD)  
Gender: [blank]  
Primary Race: [blank]  
Secondary Race (answer only if applicable): [blank]  
Ethnicity: [blank]

**Client Profile Assessment**

No Client Profile Assessment is specified for this Provider.

**Client Notes**

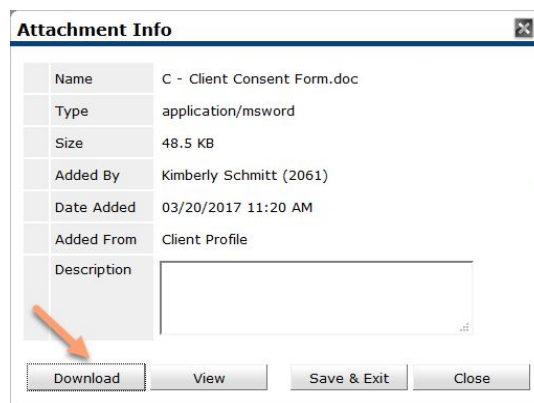
Provider	Note Date	Note Preview	Full Note
No matches.			

**File Attachments**

Date Added	Name	Description	Type	Provider	Added From
03/20/2017	C - Client Consent Form.doc		doc	Chicago Coordinated Entry System (CES) - Skilled Assessors Project	Client Profile
03/20/2017	A - Standard Agency Privacy Posting.doc		doc	Chicago Coordinated Entry System (CES) - Skilled Assessors Project	Entry/Exit

Showing 1 - 2 of 2

- D. Click **Download** to download the file to your computer.



**Attachment Info**

Name: C - Client Consent Form.doc  
Type: application/msword  
Size: 48.5 KB  
Added By: Kimberly Schmitt (2061)  
Date Added: 03/20/2017 11:20 AM  
Added From: Client Profile  
Description: [text area]

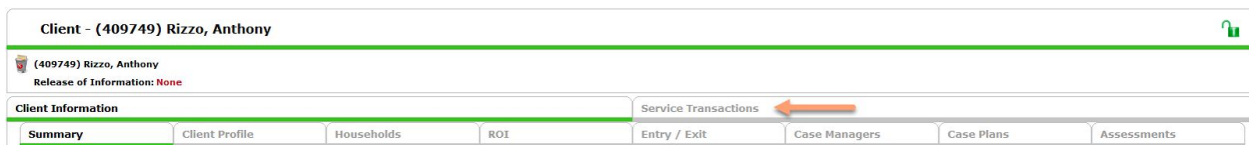
**Download** | View | Save & Exit | Close

**Step 3:** Update the **Need Status** within **two business days** of referral, and keep the client's **Need Status** updated throughout the housing process.

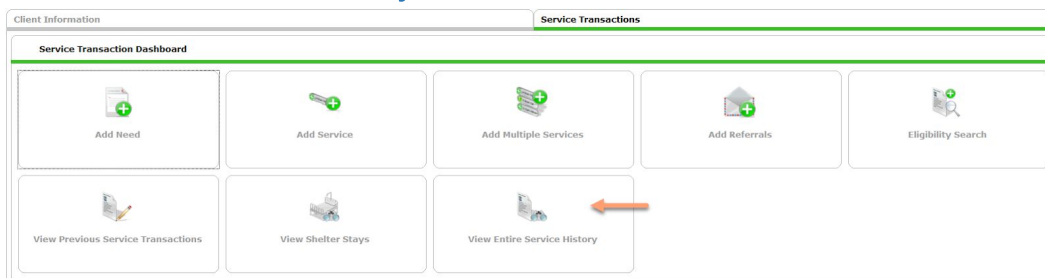
Need Statuses are the primary communication mechanism to track progress through Coordinated Entry. Need Statuses have two purposes: they help both people experiencing homelessness access housing and help projects keep their units filled. **Providers are expected to keep need statuses updated throughout the housing process.** This includes any activity that occurs after enrollment—if, after enrolling a client, something occurs that prevents the project from housing them, please update the referral need status to the relevant need status so the client can be rematched and/or exited from coordinated entry. Updates to Need Status need to occur within **2 business days.**

**30 second demo:** [https://youtu.be/YS6O6\\_7tmX8](https://youtu.be/YS6O6_7tmX8)

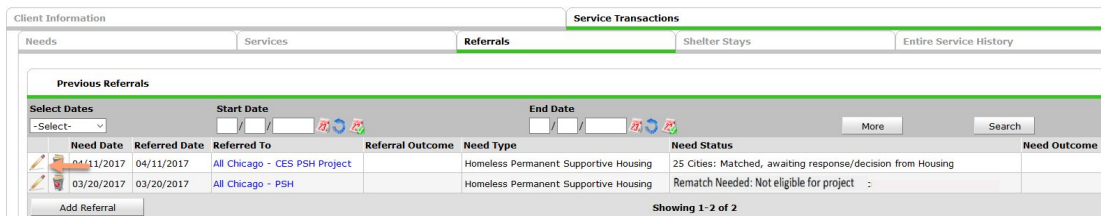
**A.** From the **Summary Tab**, click the **Service Transactions Tab**.



**B.** Click **View Entire Service History**.



**C.** Click the **Referrals Tab**, and then click the  icon next to the referral to your project



**D.** Click the  icon next **Need Information**.

Client - (409749) Rizzo, Anthony

(409749) Rizzo, Anthony  
Release of Information: None

Client Information Service Transactions

Edit Referral

Household Members

This Client is not a member of any Households.

Need Information

Need: Homeless Permanent Supportive Housing (BH-8400.3000)  
 Provider: Chicago Coordinated Entry System (CES) - Skilled Assessors Project (1474)  
 Date of Need: 04/11/2017 12:09:03 PM  
 Amount if Financial: No amount entered.  
 Notes: No notes entered.

**E.** Frequently update the **Notes** section to keep the CES team updated about important developments during the housing process. Choose the appropriate **Need Status** from the drop-down list and click **Save & Exit**.

Client Information Service Transactions

Edit Need

Household Members

This Client is not a member of any Households.

Need Information

Provider\*: Chicago Coordinated Entry System (CES) - Skilled Assessors Project (1474)

Need\*: Homeless Permanent Supportive Housing (BH-8400.3000)

Date of Need\*: 04/11/2017 12:09:03 PM

Amount if Financial:

Notes: 4/12/17 - Case manager attempted to call and email client, emergency contact, and case manager at All Chicago Emergency Shelter.  
Ken Lewis  
All Chicago PSH  
4/11/17 - Case manager attempted to call and email client.

Need Status\*: 25 Cites: Attempted contact

Outcome of Need: -Select-

If Need is Not Met, Reason: -Select-

**F.** See the [Glossary:ReferralNeedStatus](#) for more detailed information about the appropriate use of **Need Statuses**.

**Step 5:** All project types will request a transfer by creating a **CES Transfer Request** to indicate that the individual or family appears to need a different level of support.

**A.** From the **Summary Tab**, click the **Entry/Exit Tab**. Then click on the  icon under the **Interim** heading associated with your project's entry.







Client - (409264) Bryant, Kris

(409264) Bryant, Kris  
Release of Information: None

Client Information Service Transactions

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

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
All Chicago - CES PSH Project (1483)	HUD	06/03/2017				
Chicago Coordinated Entry System (CES) - Observational Assessment Project (1477)	HUD	05/30/2017				

B. Click on **Add Interim Review**.

**Interim Reviews**

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
No matches.		

**Add Interim Review**

Exit

C. Select **CES Transfer Request** from the drop-down menu and click **Save & Continue**.

**Edit Interim Review Data**

Interim Review Data

Entry / Exit Provider: All Chicago - CES PSH Project (1483)

Entry / Exit Type: HUD

Interim Review Type\*: CES Transfer Request Form

Review Date\*: 07 / 05 / 2017 5 : 10 : 17 PM

Save & Continue Cancel

D. Ensure that the **Chicago Coordinated Entry System (CES) Transfer Request Form** is chosen from the Assessment menu.

**Interim Review Assessment**

Select an Assessment

- DFSS and IDHS Supplemental Assessment
- HUD CoC and ESG Entry (Copy)
- VA SSVF Entry for HP and RRH (2016)
- VA SSVF Exit (2016 Chicago)
- VA SSVF Update (2016 Chicago)
- Incorrect Program/Provider
- Chicago Coordinated Entry System (CES) Transfer Request Form**



**E.** Complete the form ensuring that your request follows the **Program Transfer Policies**. You can find **Program Transfer Policies** by clicking [here](#).

<i>Project Requesting Transfer Details:</i>	
Project Team Member - Name:	<input type="text"/> <span style="float: right; font-size: small;">G</span>
Project Team Member - Email address:	<input type="text"/> <span style="float: right; font-size: small;">G</span>
Project Team Member - Phone number:	<input type="text"/> <span style="float: right; font-size: small;">G</span>
<i>Client Information:</i>	
Please indicate the recommended project type for the client (i.e. Rapid Re-housing or Permanent Supportive Housing). Please select one option that would best meet the client's needs.	<input type="text" value="-Select-"/> <span style="float: right; font-size: small;">G</span>
Please provide details for the transfer request:	<div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div> <span style="float: right; font-size: small;">G</span>
Date the client's current project involvement will conclude if the client is not currently in a permanent housing program:	<input type="text"/> / <input type="text"/> / <input type="text"/> <span style="float: right; font-size: small;">G</span>
For completion by CES Matching Team - Request Approval:	<input type="text" value="-Select-"/> <span style="float: right; font-size: small;">G</span>
Date of acceptance or denial:	<input type="text"/> / <input type="text"/> / <input type="text"/> <span style="float: right; font-size: small;">G</span>

**F.** Click **Save & Exit** and await a decision regarding the transfer from the CES Matching Team.