

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**.

	System News	5 (8) *	Agency News (0)	
Home	Date	Headline		
ClientPoint	NAM.			
ResourcePoint	03/15/2017	Recorded Webinar: HMIS Workflow	Refresher Training	
ShelterPoint	01/31/2017	Helpdesk Link		
Reports	🬞 09/14/2016	ShelterPoint Guide now available or	n the Helpdesk	
Admin	06/08/2016	Recorded Webinar on ReportWriter		
Logout	🬞 05/31/2016	New Helpdesk Phone Number!		
	05/11/2016	Recording of HUD Workflow Refresh	er Training	
				View All

B. Click Add Counts Report.

system new	s (8)*	Agency News (0)	0	Follow	Up List (C
Date	Headline			Client ID	Туре
03/15/2017	7 Recorded Webinar: HMIS Workfl	ow Refresher Training			
01/31/2017					
09/14/2016					
06/08/2016					
05/31/2016	5 New Helpdesk Phone Number!				
05/11/2016	Recording of HUD Workflow Refr	esher Training			
			View All		
▼ Custon	nize Home Page Dashboard				



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

Refres

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*.

Top-Left	Top-Right	Bottom-Left	Botton	n-Right
Report Name C	utstanding Incoming Referr	als	•	
Description sp	sts all outstanding referrals becified date range. An outs rovided, the need status is r ne referral outcome is not 'A	tanding referral is on not 'Closed', the need	e that has not ha outcome is not '	d a service
Filters				
			-	
	Start Date	End	Date	
	Start Date	End	Date / / /	
		End wider <u>Reporting</u>	/ /	
		ovider Reporting	/ /	Clear



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.

t Dashlet			2127	
op-Left 🛛 💼	Top-Right	Bottom-Left	Bottom-R	ight
Report Name	-Select-	~		
Description	N/A			
6	A Counts Report is not	currently designated for th	is location.	
			ок	Cancel

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.

	Dut.				
×	03/15/2017	Recorded Webinar: HMIS	▼ Count Details		X
*	01/31/2017	Helpdesk Link	Incoming Referrals		
藼	09/14/2016	ShelterPoint Guide now a	-	ousehold ID Referral Date Referral I	anking Need Type
۲	06/08/2016	Recorded Webinar on Rep		04/11/2017	Homeless Permanent Supportive
黉	05/31/2016	New Helpdesk Phone Num	<		>
*	05/11/2016	Recording of HUD Workflo	Download Full Report	Showing 1-1 of 1	L.
Inc	oming Refer	rals: → 1			



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 \swarrow icon next to the client's entry into the **Chicago Coordinated Entry System (CES) Skilled Assessor Project**, and then click **Save & Continue**.

Project	Edit Entry Data - (4	09749) Rizzo, Anthony		×	Back Date
Profile	Household Memb	ers			Type here for Global Search 🦃 🥀 🌟 🤇
Client - (409749) Rizzo, A	11 This Client is not a me	ember of any Households.			- Cur
(409749) Rizzo, Anthony Release of Information: None	Edit Entry Data -	(409749) Rizzo, Anthony			
Client Information	Provider	Chicago Coordinated Entry System	(CES) - Skilled Assessors Project (1474)		
Summary Client P	Туре	HUD		ars.	Case Plans Assessments
Added to the system 03/20/2017 10:3	Entry Date *	03 / 22 / 2017 🕂 🖏 🖏 11	✓: 55 ✓: 58 ✓ AM ✓		
Name Rizzo, Antho Date of Birth 01/01/1993 Social Security 1	1				2
Households			Save & Continue Can	;el	
ID Type		Head of Household Relationship	Program	Туре	Entry Date Exit Date
Search Existing Households	Start New Household		Chicago Coordinated Entry System (CES) - Skilled Assessors Project	HUD	
			All Chicago - CES ES Project	HUD	03/21/2017 🖉
			Add Entry / Exit		Showing 1-2 of 2

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.

Phone Number: 555-55-CUBS G Email address: arizzo@cubs.com G Mailing address: G Are you currently enrolled in any social service programs? Yes (HUD) G If yes, which projects are you currently enrolled in? All Chicago Emergency Shelter G If yes, what is the name of one of your current case managers? Kim Schmitt G	Contact Information: Client			
Mailing address: 6 Are you currently enrolled in any social service programs? Yes (HUD) 6 If yes, which projects are you currently enrolled in? All Chicago Emergency Shelter 6 If yes, what is the name of one of your Kim Schmitt 6	Phone Number:	555-555-CUBS G		
Are you currently enrolled in any social service programs? Yes (HUD) G If yes, which projects are you currently enrolled in? All Chicago Emergency Shelter G If yes, what is the name of one of your Kim Schmitt G	Email address:	arizzo@cubs.com	G	
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are you currently enrolled in? If yes, what is the name of one of your Kim Schmitt G	in any social service	Yes (HUD) V		
name of one of your Kim Schmitt G	are you currently	All Chicago Emergency Shelter	G	
	name of one of your	Kim Schmitt	G	
If yes, what is the case manager's email kscmitt@allchicago.org G address?	manager's email	kscmitt@allchicago.org	G	
Emergency Contact Information:	Emergency Contact Informat	ion:		
Name: Theo Epstein G	Name:	Theo Epstein	G	
Contact number: 555-108-CUBS G	Contact number:	555-108-CUBS	G	
Relationship: President of Baseball Operations G	Relationship:	President of Baseball Operations	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. if you eat dinner at a specific place any night of the week, spend time at a library or attend any ongoing program.				This can includ
Notes on contacting Client often sleeps near Clark and Addison. client:		Client often sleeps near Clark and Addison.		
				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 *licon* next to the documentation you wish to download.

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Date Added ▼ Name Description Type Provider Added From V V Q 0/20/2017 C - Client Consent Form.doc doc Chicago Coordinated Entry System (CES) - Skilled Assessors Project Client Profile V Q 0/20/2017 C - Standard Agency doc Chicago Coordinated Entry System (CES) - Skilled Assessors Project Client Profile	Add New Client Note	Print					No	matches.			
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Add New Fie Attachment Showing 1-2 of 2	Date Added		C - Client Cons Form.doc A - Standard A	Agency						ntry/Exit	4

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

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



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. <u>Providers are</u> <u>expected to keep need statuses updated throughout the housing process.</u> 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 <u>2 business days.</u>

30 second demo: https://youtu.be/YS6O6_7tmX8

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

Client - (4097	749) Rizzo, Anthony						ſu
蘭 (409749) Rizzo, Ant Release of Informal							
Client Information				Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments

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

Service Transaction Dashboard								
Add Need	Add Service	Add Multiple Services	Add Referrals	Eligibility Search				
view Previous Service Transactions	View Shelter Stays	View Entire Service History						

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

Veeds			Services		Referrals		Shelter Stays	1	Entire Service History	1
р	revious Refer	rals								
Select	Dates		Start Date		End Date	3				
Select -Selec			Start Date	5	End Date	a / 🧖 🔵 🧸	2	More	Sean	ch
	t- ~	Referred Date		Referral Outcome		1 🥂 🦉 🤇	🧞 Need Status	More	Sean	ch Need Outcom
-Selec	t- ~					1 20 0				



D. Click the *i*con next **Need Information**.

(409749) Rizzo, Anthor Release of Information		
ent Information		Service Transactio
Edit Referral		
 Household Mem 	abers	
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his Client is not a me	mber of any Households.	
his Client is not a mer		
Veed Information	on	
Need Informatio	on Homeless Permanent Supportive Housing (BH-8400.3000)	
Need Information	on Homeless Permanent Supportive Housing (BH-8400.3000) Chicago Coordinated Entry System (CES) - Skilled Assessors Project (1474)	

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		4
▼ Household Memb	pers	
This Client is not a men	iber of any Households.	
Need Information		
Provider *	Chicago Coordinated Entry System (CES) - Skilled Assessors Project (1474) $ \!$	
Need*	Homeless Permanent Supportive Housing (BH-8400.3000) V Look Up	
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 Al Chicago Emergency Shelter. Kon Lexim Al Chicago F3H 4/11/17 - Case manager attempted to call and email client,	
Need Status*	25 Cities: Attempted contact	Ŷ
Outcome of Need	-Select-	
If Need is Not Met, Reason	-Select-	<u> </u>
		Save Save & Exit Exit

F. See the <u>Glossary:ReferralNeedStatus</u> 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 **b** icon under the **Interim**heading associated with your project's entry.

(409264) Bryant, Kri Release of Informati									
ent Information				Service T	ransactions				
Summary	Client Profile	Households	ROI	Entry / Ex	dt 🛌	Case Managers	Case Plans	Assessmen	ts
		🕧 Reminder: Hou	usehold members must	t be established on Hous	eholds tab bei	e creating Entry / Exits			
Entry / Exit Program		() Reminder: Hou	usehold members must	t be established on Hous Type		e creating Entry / Exits	Exit Date		v Client
Program	ES PSH Project (1483)	(1) Reminder: Hou	usehold members must						v Client Count



B. Click on Add Interim Review.

1 2021	REP HAUSOLIUMS
th this Entry / Exit	
	Client Cour
No matches.	
	Exit

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

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 🗸

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

	Interim Review Assessment				
ĺ	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		



making homelessness history

E. Complete the form ensuring that your request follows the **Program Transfer Policies.** You can find **Program Transfer Policies** by clicking <u>here</u>.

Pr	oject Requesting Transfer De	etails:	
	Project Team Member - Name:		G
	Project Team Member - Email address:		G
	Project Team Member - Phone number:		G
CI	ient Information:		
	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.	-Select- v G	
	Please provide details for the transfer request:		G
	Date the client's current project involvement will conclude if the client is not currently in a permanent housing program:	// Z G	
	For completion by CES Matching Team - Request Approval:	-Select- V G	
	Date of acceptance or denial:	// 🧖 💐 G	

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