# HOMEFIRST

Where Homelessness Ends™

Coordinated Entry System
Access Point Training

# Training Goals

To understand and prevent racial bias affecting assessments;

To come away with an in-depth understanding of CES Assessment steps 3-5:

- How to complete the standardized assessment tools (the VI-SPDAT)
- CES HMIS Data Entry
- Note on Enhanced Assessment and Prioritization

# Training Agenda

- Summary of Access and Initial Assessment training
- Racial bias and assessments
- Completing the Standardized Assessment Tools (VI-SPDAT)
- HMIS Data Entry
- HUD Touchpoints
- Case Noting
- Anonymous entries
- Collection of Initial Eligibility Documentation
- Enhanced Assessment
- Enhanced Prioritization at CES Case Conference

# Access Partner Workflow Summary

If you encounter someone who is homeless, follow these steps:

1. Complete Housing Problem Solving Conversation
   i. Assess for eligibility for CES
      a. Category 1: Literally homeless
      b. Category 4: Fleeing domestic violence with nowhere to go
   ii. Complete a strengths-based conversation to identify housing options other than the homeless services system. Do not continue if options are identified!

- Complete a CES ROI!
- Search in HMIS for: VI-SPDAT within the last year, up to date contact info, and active status on By-Name-List

2. Crisis Navigation, including emergency shelter

3. Move on to step three, the Standardized Assessment Tool (VI-SPDAT) only if necessary. **When is this necessary?**

# Access Partner Process Summary

Remember to always be Trauma-informed!

- Use information gained throughout the process
- Tailor the assessment order and pace to the individual's needs
- Relay information in warm-handoffs as needed

# Racial Bias in Assessments

The VI-SPDAT consistently leads to racial inequity:

Studies across the U.S. have found that being white is consistently a predictor of having a higher score than other groups, regardless of actual life circumstances.

This means that Permanent Supportive Housing is <u>more likely</u> to go towards someone who is white than black with the same vulnerabilities if the system uses the VI-SPDAT.

The phrasing of the questions as written can mean different things to people with different backgrounds, especially if there is a lack of trust between the interviewer and interviewee.

# Racial Bias in Assessments

Therefore, it is critically important to:

- introduce, rephrase and reframe questions based on the situation:
    - Remind people that answers will <u>not</u> be used to screen people out of housing opportunities, and will remain confidential within HMIS;
- take into account trauma factors in conducting the Assessment; and
- whenever possible ensure a trusting and safe environment for the Assessment.

# A Note About Order...

- Workflow can be changed depending on participant needs, agency intake processes, and situational context.
  - Sometimes you'll need to start by enrolling them, sometimes they're already enrolled
  - The VI-SPDAT can be done on paper then entered, or entered live into the system
  - It may make sense to collect initial eligibility documents throughout the interview

# CES Assessment Step 3: Standardized Assessment Tool

# VI-SPDAT Assessment

The VI-SPDAT is the Standardized Assessment Tool that is used to assess each client's level of vulnerability and will determine where they fall within the Coordinated Entry By-Name-List.

Vulnerability
Index
Service
Prioritization
Decision
Assistance
Tool

# VI-SPDAT Assessment

**Before Beginning the VI please explain the following:**

- The following questions can be perceived as personal and invasive, but it is important that they answer them with complete honesty.
- Emphasize that these questions are not meant to judge the client in any way, they are used to rate vulnerability and eligibility for services.
- Refusal to answer questions may directly impact qualification for services

# VI-SPDAT Assessment

- **Never disclose the VI-SPDAT score to the client**
- Do not promise placement or estimate length of time before placement
- **It is never guaranteed that a client will enter a specific program**
- To protect the dignity and the confidentiality of the client avoid completing the assessment in public spaces
- Focus on getting the client to use yes or no answers to complete the assessment in a timely manner and to avoid triggering a negative emotional response

# VI-SPDAT Assessment

Three versions of the tool used, corresponding to each CES population:

- Individuals VI-SPDAT
- TAY VI-SPDAT
- Family VI-SPDAT

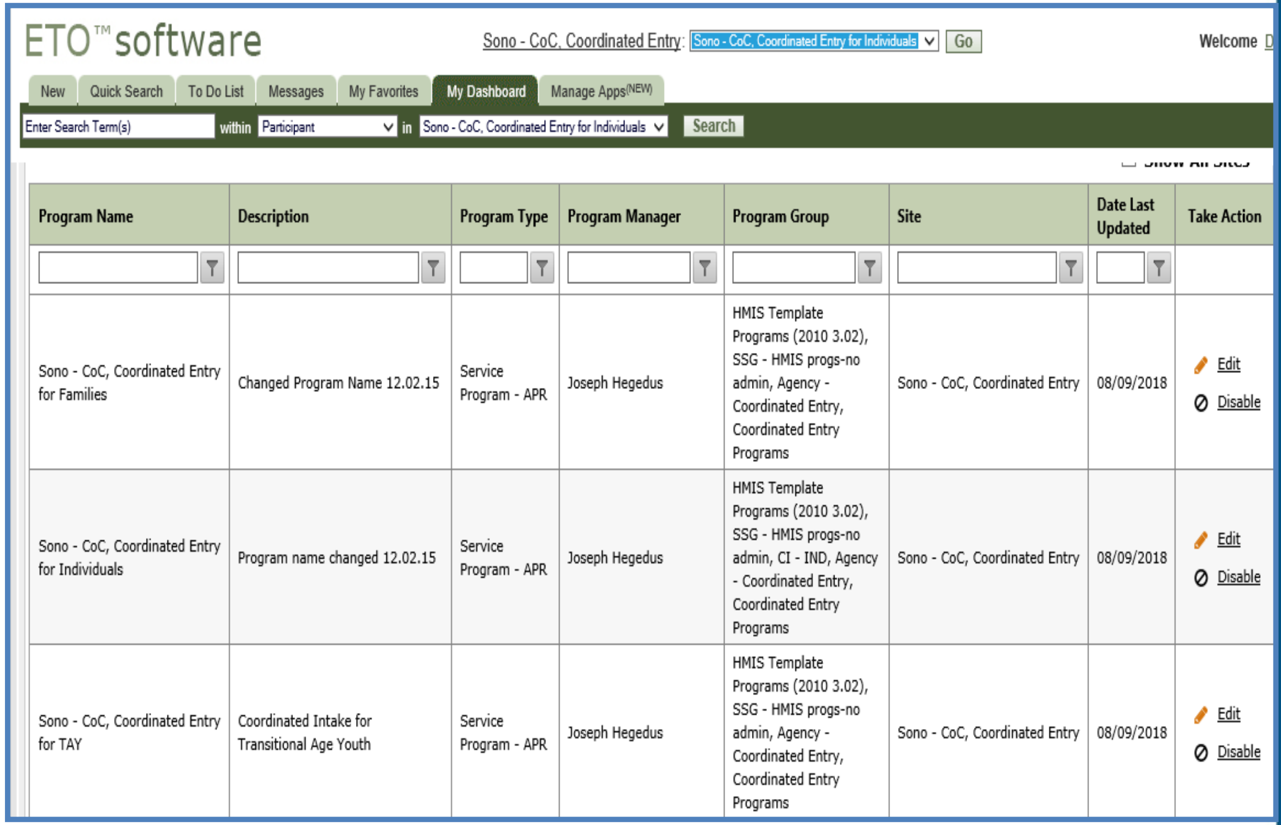
# VI-SPDAT Assessment

Let’s dive into the questions!

# CES Assessment Step 4:
# HMIS Data Entry

# CES Program Criteria

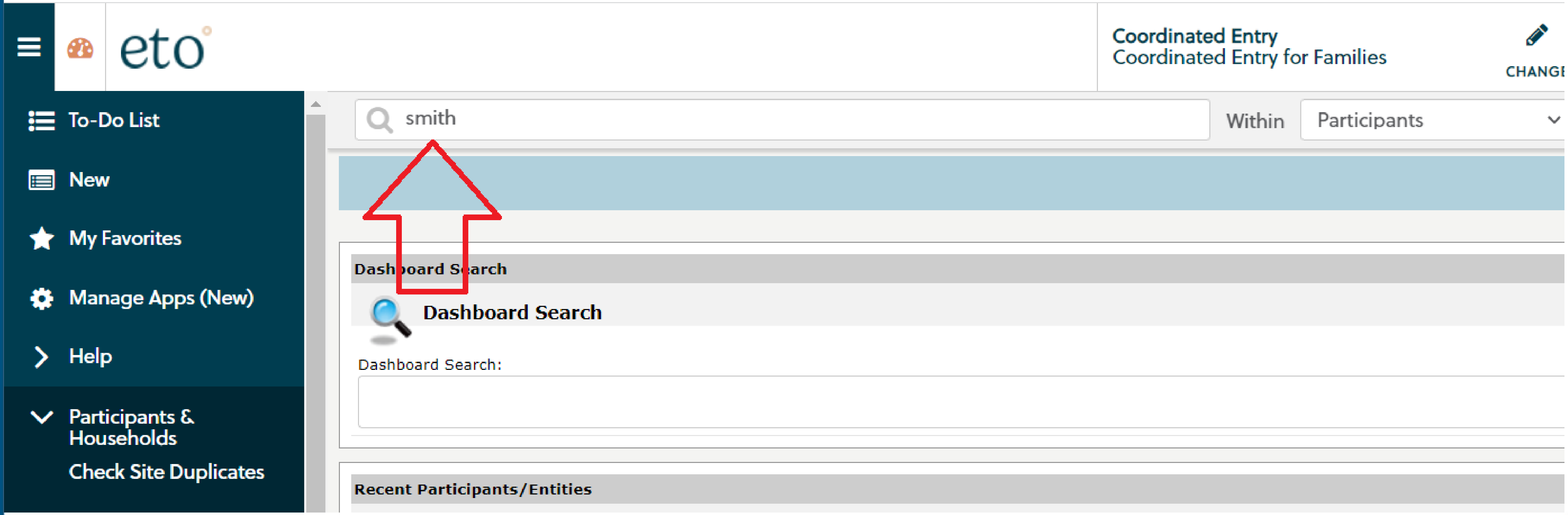
- **CES-Individuals:** All single adults over the age of 24 are enrolled individually as Head of Household.
- **CES-Families:** Enroll only the Head of Household for each family. Families must have minor children in their custody more than 50% of the time to qualify for family enrollment. Maximum of 2 adults (age 18+)– this could look like 1 parent and 1 adult child, or 2 grandparent, etc.
- **CES-TAY:** Enroll Transitional Age Youth between the ages of 18-24. (*If the participant is expected to turn 25 within the next 6 months, then enroll into **CES-Individuals.***)




| Program Name | Description | Program Type | Program Manager | Program Group | Site | Date Last Updated | Take Action |
|---|---|---|---|---|---|---|---|
| Sono - CoC, Coordinated Entry for Families | Changed Program Name 12.02.15 | Service Program - APR | Joseph Hegedus | HMIS Template Programs (2010 3.02), SSG - HMIS progs-no admin, Agency - Coordinated Entry, Coordinated Entry Programs | Sono - CoC, Coordinated Entry | 08/09/2018 | Edit Disable |
| Sono - CoC, Coordinated Entry for Individuals | Program name changed 12.02.15 | Service Program - APR | Joseph Hegedus | HMIS Template Programs (2010 3.02), SSG - HMIS progs-no admin, CI - IND, Agency - Coordinated Entry, Coordinated Entry Programs | Sono - CoC, Coordinated Entry | 08/09/2018 | Edit Disable |
| Sono - CoC, Coordinated Entry for TAY | Coordinated Intake for Transitional Age Youth | Service Program - APR | Joseph Hegedus | HMIS Template Programs (2010 3.02), SSG - HMIS progs-no admin, Agency - Coordinated Entry, Coordinated Entry Programs | Sono - CoC, Coordinated Entry | 08/09/2018 | Edit Disable |

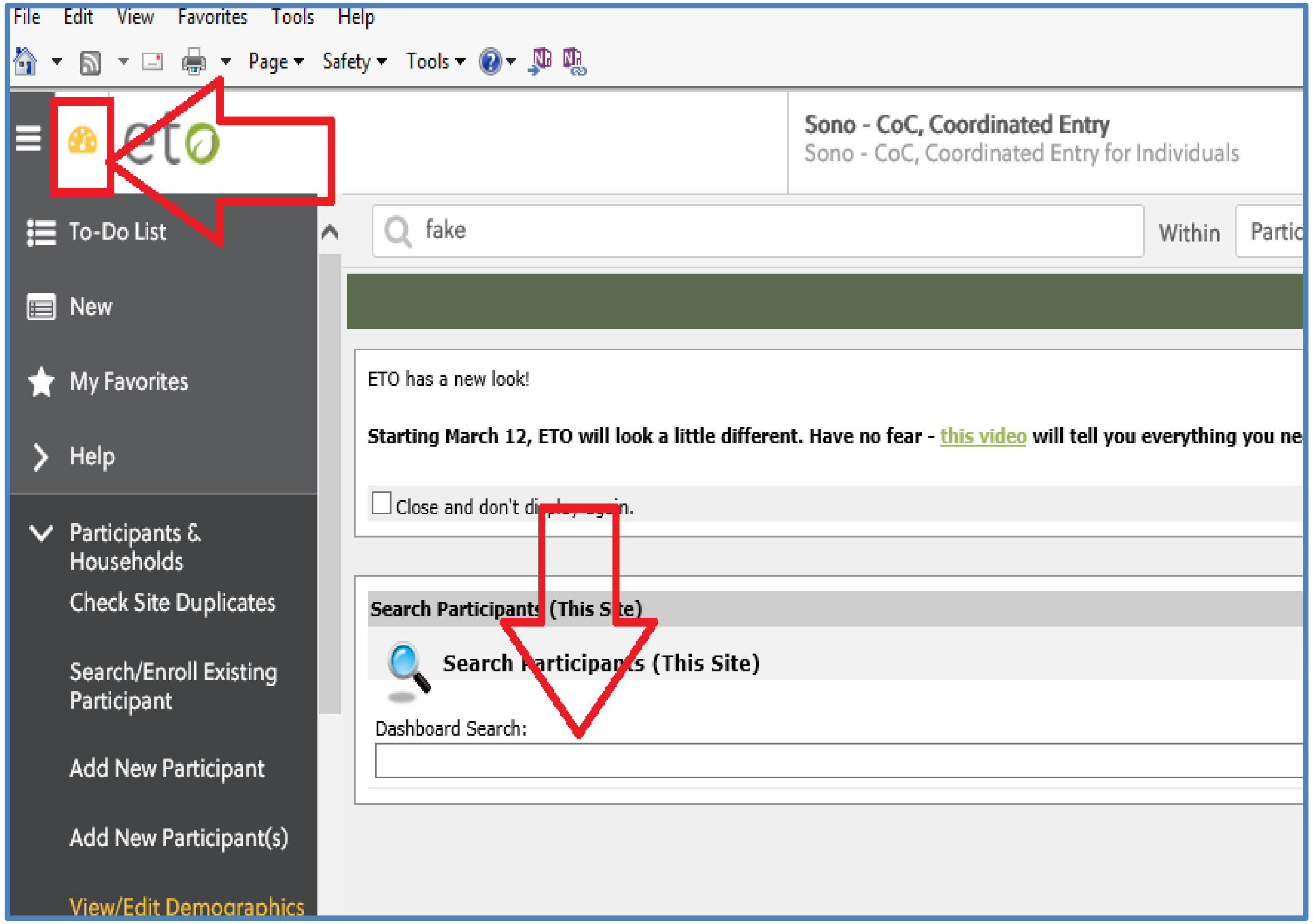
# Enrollment Search

**1: Quick Search:** Enter the client's name into the quick search bar to see if they already have an existing case within the CES HMIS System.



# Enrollment Search

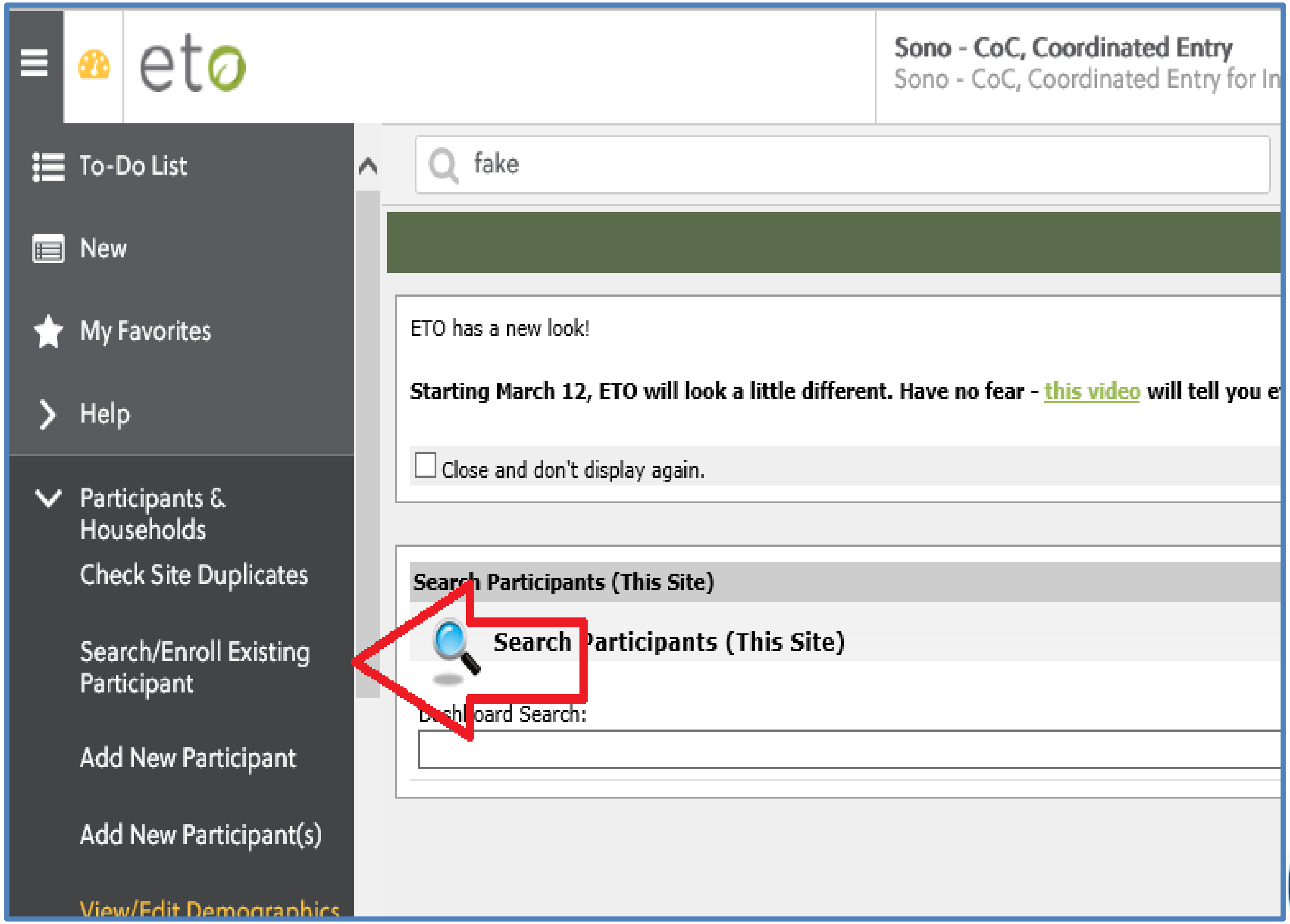
**2: Dashboard Search**: Enter the client's name into the dashboard search bar to see if the client has ever been in CES.



Part 3:

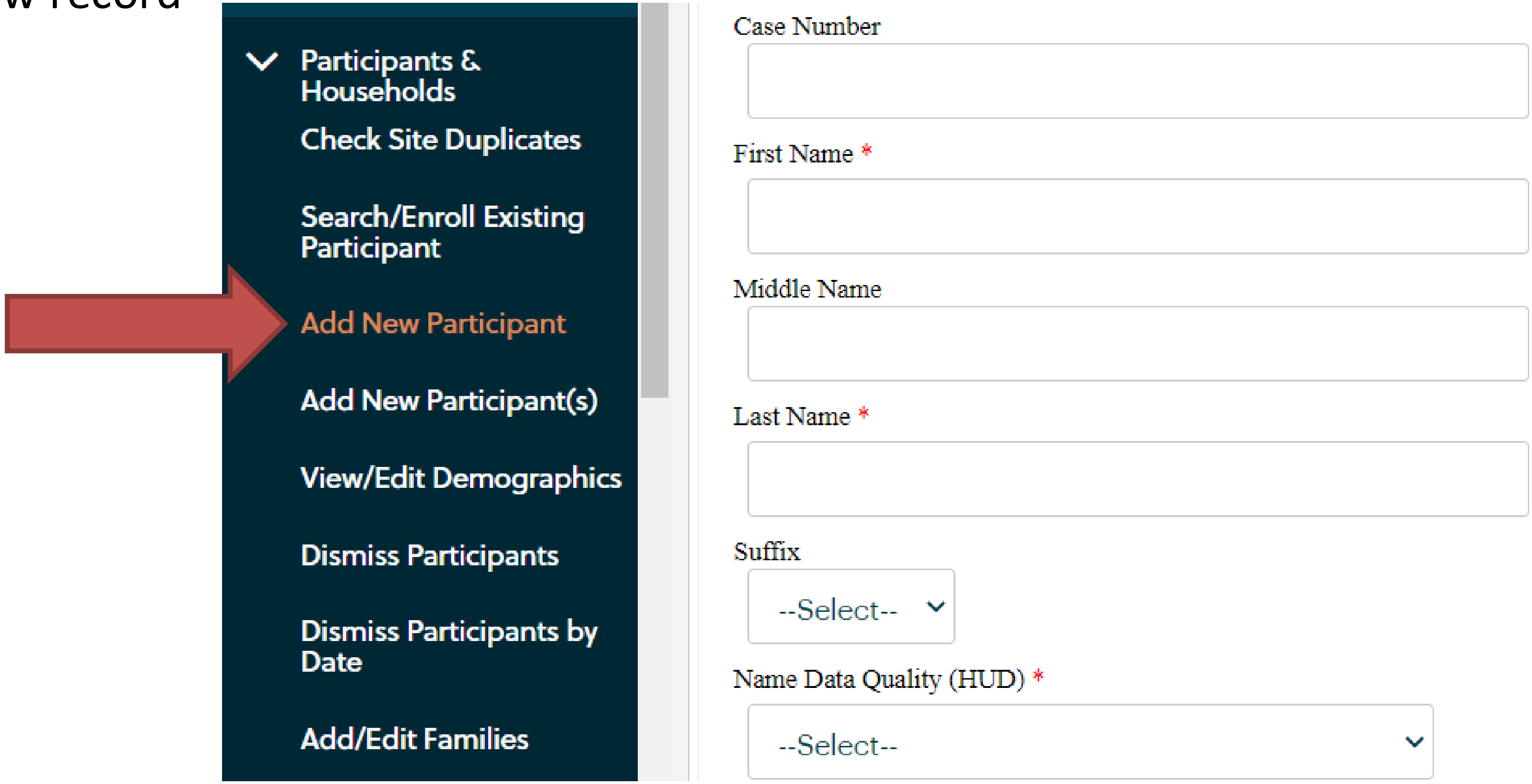
**Search/Enroll-**
Search within the HMIS enterprise by clicking on the Search Enroll Participant icon now located in the tool bar on the left side

# Enrollment Search



# Enrollment Search

**Add New Participant-** If you do not find any previous record of the participant then click '**Add New Participant**' to create a new record



# Anonymous Entry

Use this process when a participant does not wish to enter their identifying information into HMIS, or is currently fleeing intimate partner violence (domestic violence).

Follow Sonoma County HMIS Anonymous Client Entry Guide for more details:
https://sonomacounty.ca.gov/Main%20County%20Site/General/Sonoma/Sample%20Dept/Divisions/Housing%20Authority/Services/A%20Service/_Documents/How%20to%20Anonymously%20Enter%20a%20Client%20in%20HMIS%20.pdf

# Anonymous Entry

**Enter client and complete initial demographics**

First Name = Client

Last Name = Refused

Name Data Quality = Client Refused

SSN = 123456789

SSN Data Quality = Client Refused

DOB = 01/01/ up or one year from real birth year

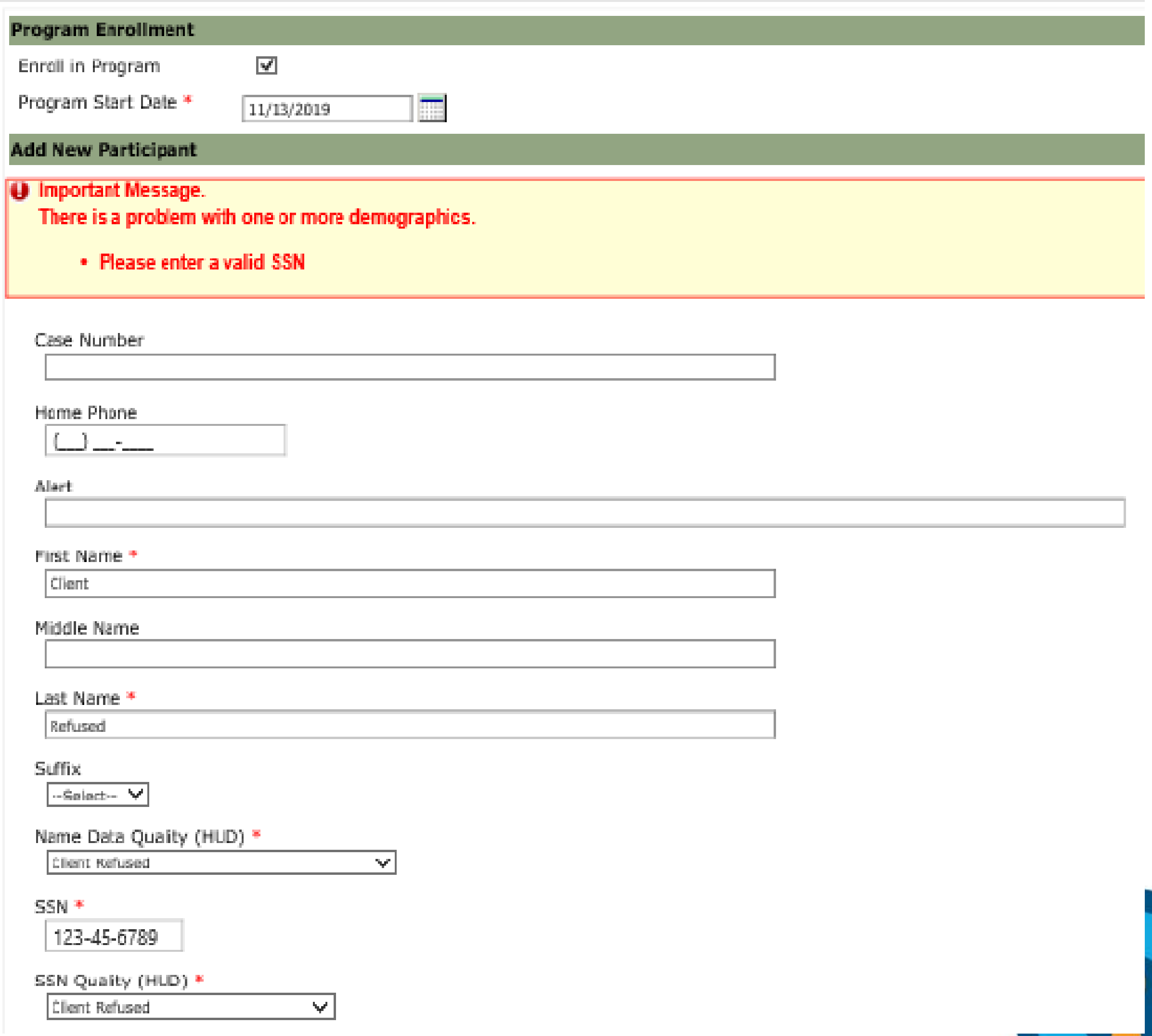
DOB Data Quality = Approximate

Gender = Enter as normal

Race = Enter as normal

Ethnicity = Enter as normal

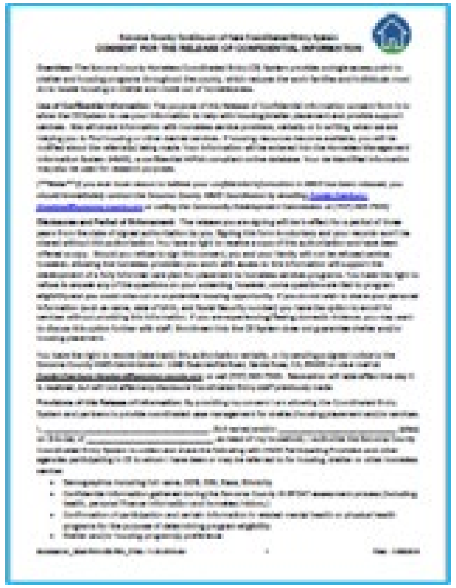
Veteran Status – Client Refused

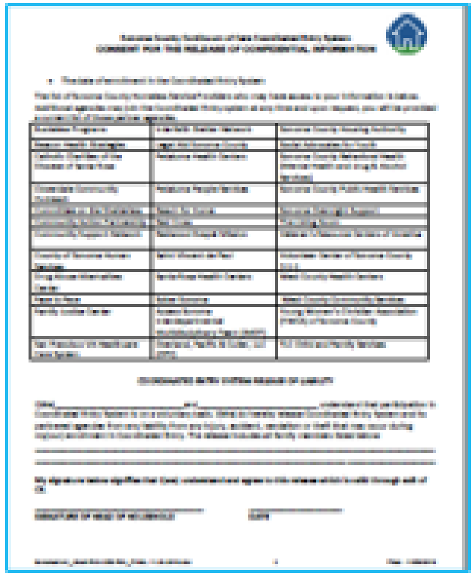


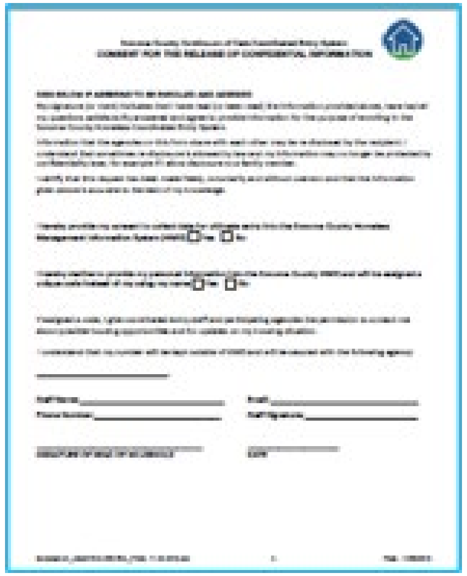
# HMIS Data Entry

**NOTE: No data entry can occur without a valid CES ROI uploaded!**

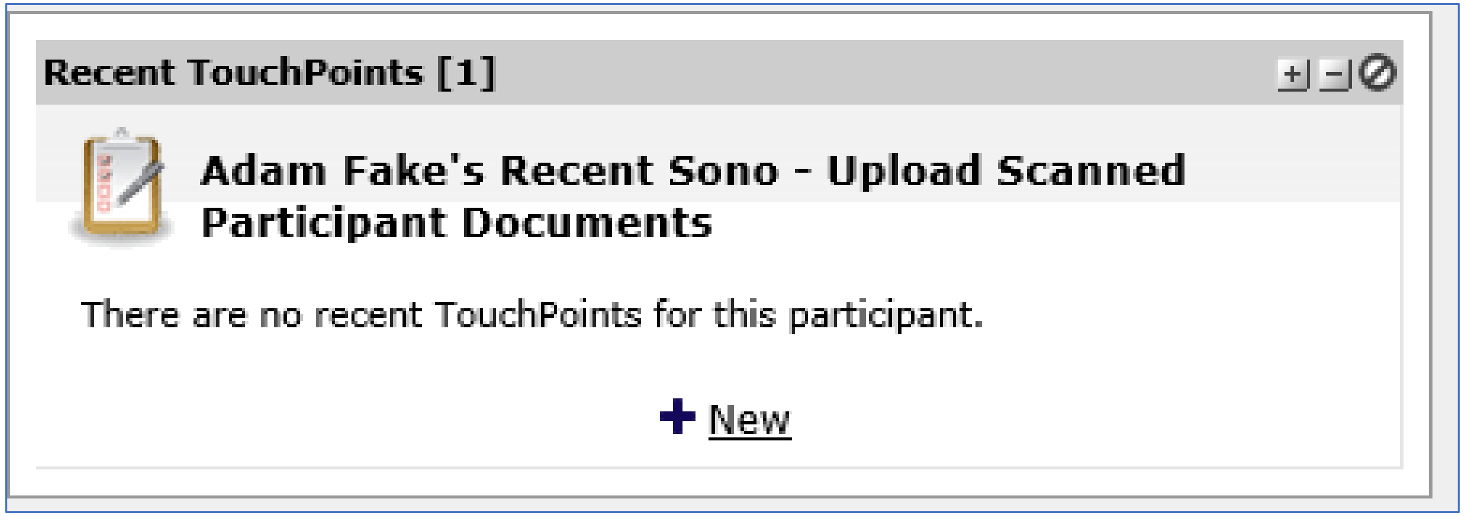
*exception if the client is anonymous







# Uploading CES ROI



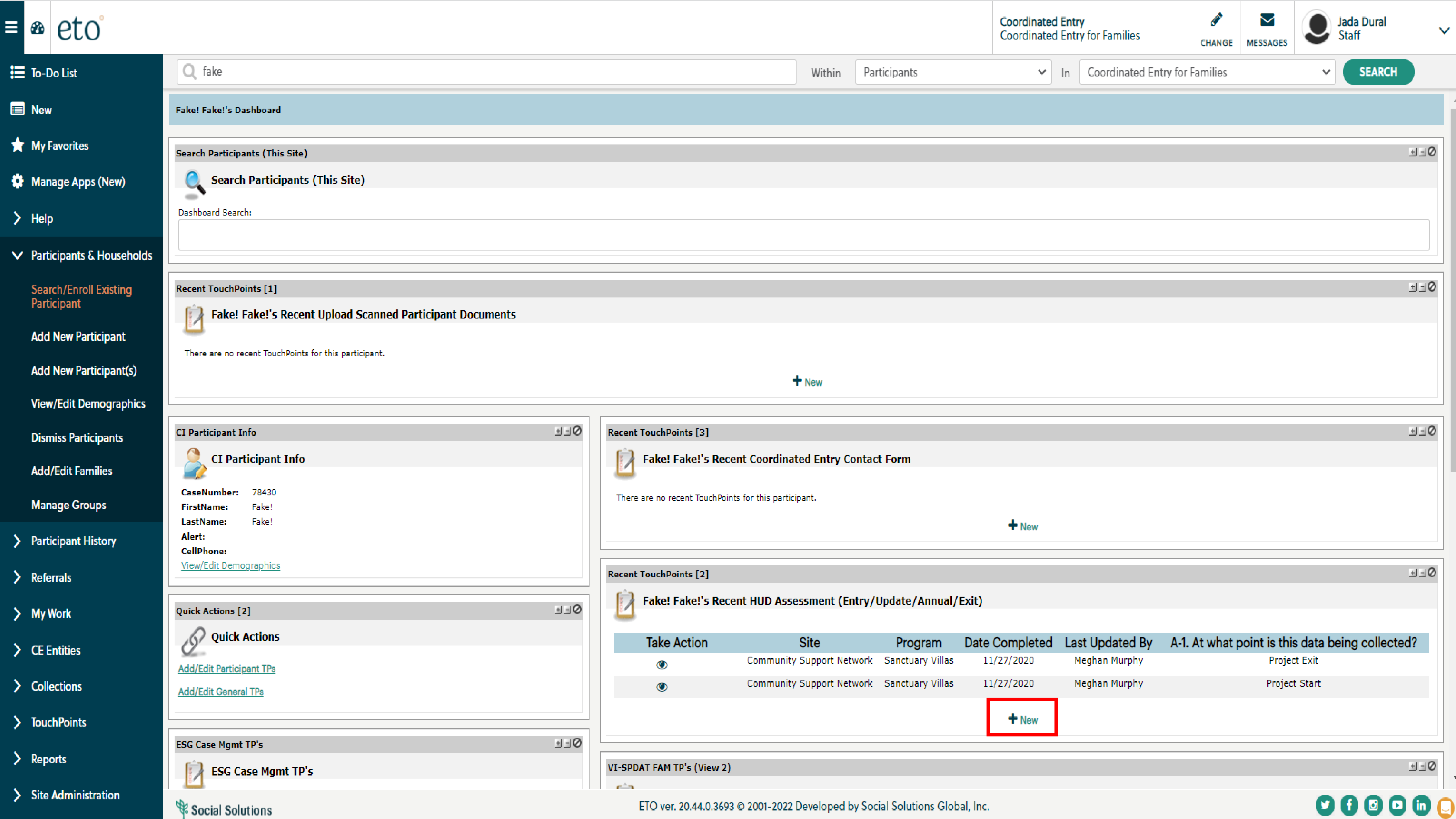
# HUD TouchPoints

- Most programs serving people experiencing homelessness require HUD Entry Assessments (also called HUD Touchpoints).
- The HUD Entry Assessment allows collection of basic data regarding the client’s current homeless situation. This will give interviewer insight regarding the client’s current situation and can help guide the process.
- HUD Entry Assessments allows service providers to track a client’s homeless history on their HMIS dashboard.
- Large gaps in HUD Touchpoints can indicate a break in homelessness, incarceration, or residing outside of the area

# HUD Start vs Update Touchpoints

- HUD Start touchpoints:
- New to system or new enrollment

- HUD Update touchpoints:
- Re-assessment on existing enrollment
- Change in income or status


eto
Coordinated Entry
Coordinated Entry for Families
CHANGE
MESSAGES
Jada Dural
Staff
To-Do List
New
My Favorites
Manage Apps (New)
Help
Participants & Households
Search/Enroll Existing Participant
Add New Participant
Add New Participant(s)
View/Edit Demographics
Dismiss Participants
Add/Edit Families
Manage Groups
Participant History
Referrals
My Work
CE Entities
Collections
TouchPoints
Reports
Site Administration
fake
Within
Participants
In
Coordinated Entry for Families
SEARCH
Fake! Fake!'s Dashboard
Search Participants (This Site)
Search Participants (This Site)
Dashboard Search:
Recent TouchPoints [1]
Fake! Fake!'s Recent Upload Scanned Participant Documents
There are no recent TouchPoints for this participant.
New
CI Participant Info
CI Participant Info
CaseNumber: 78430
FirstName: Fake!
LastName: Fake!
Alert:
CellPhone:
View/Edit Demographics
Recent TouchPoints [3]
Fake! Fake!'s Recent Coordinated Entry Contact Form
There are no recent TouchPoints for this participant.
New
Recent TouchPoints [2]
Fake! Fake!'s Recent HUD Assessment (Entry/Update/Annual/Exit)
Take Action | Site | Program | Date Completed | Last Updated By | A-1. At what point is this data being collected?
Community Support Network | Sanctuary Villas | 11/27/2020 | Meghan Murphy | Project Exit
Community Support Network | Sanctuary Villas | 11/27/2020 | Meghan Murphy | Project Start
New
Quick Actions [2]
Quick Actions
Add/Edit Participant TPs
Add/Edit General TPs
ESG Case Mgmt TP's
ESG Case Mgmt TP's
VI-SPDAT FAM TP's (View 2)
Social Solutions
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# Enter the VI-SPDAT

**VI-SPDAT IND TP's**

**VI-SPDAT IND TP's**

| Take Action | Date Completed | Last Updated By | Survey Date | VI-SPDAT Singles Score |
|---|---|---|---|---|
| | 8/11/2021 | Hunter Scott | | 6.0 |

+ New

# Enter the VI-SPDAT

Sono - VI-SPDAT for Single Adults for Jones, Fake John on

Populate with previous response: -- Select --

Identifier: Auto-generated when Save

Make sure the date matches the date of the enrollment.

If you are updating with a new assessment on an existing case, you can populate with a previous VI-SPDAT's responses- but still need to ask each question.

# Case Noting

Enter case note whenever you encounter the client or provide a service related to CES.

Case noting triggers a client to be ‘active’ in CES. If there are no case notes or service touches in HMIS for 90 days, the client becomes ‘inactive’ and will not be up for referrals until they have touched the system again.

If completing a new VI-SPDAT for someone already enrolled, the case note provides crucial information of updates and why you are completing a new assessment!

# Case Notes Should Include:

- Monthly income and source (employment, SSI/SSDI, pension, etc), if different than enrollment
- When did their homeless situation begin?
- Does the client have a service dog or pet?
- Include contact information of any existing agencies/case managers with whom they may already be working
- Include any information that may directly impact placing this person into programs (PC-290 Status disqualifies clients from certain programs)
- Does the client require an interpreter? Why (language, disability, etc)?
- Include any observations regarding their vulnerability not reflected in the VI-SPDAT.

This is where you, as a service provider, can indicate if you feel there are any gaps in the information provided eto

Coordinated Entry
Coordinated Entry for Families

CHANGE MESSAGES

Jada Dural
Staff

- To-Do List
- New
- My Favorites
- Manage Apps (New)
- Help
- Participants & Households
  - Search/Enroll Existing Participant
  - Add New Participant
  - Add New Participant(s)
  - View/Edit Demographics
  - Dismiss Participants
  - Add/Edit Families
  - Manage Groups
- Participant History
- Referrals
- My Work
- CE Entities
- Collections
- TouchPoints
- Reports
- Site Administration

fake Within Participants In Coordinated Entry for Families SEARCH

Fake! Fake!'s Dashboard

**Search Participants (This Site)**

Search Participants (This Site)

Dashboard Search:

**Recent TouchPoints [1]**

Fake! Fake!'s Recent Upload Scanned Participant Documents

There are no recent TouchPoints for this participant.

+ New

**CI Participant Info**

CI Participant Info

**CaseNumber:** 78430
**FirstName:** Fake!
**LastName:** Fake!
**Alert:**
**CellPhone:**

View/Edit Demographics

**Recent TouchPoints [3]**

Fake! Fake!'s Recent Coordinated Entry Contact Form

There are no recent TouchPoints for this participant.

+ New

**Quick Actions [2]**

Quick Actions

Add/Edit Participant TPs

Add/Edit General TPs

**Recent TouchPoints [2]**

Fake! Fake!'s Recent HUD Assessment (Entry/Update/Annual/Exit)

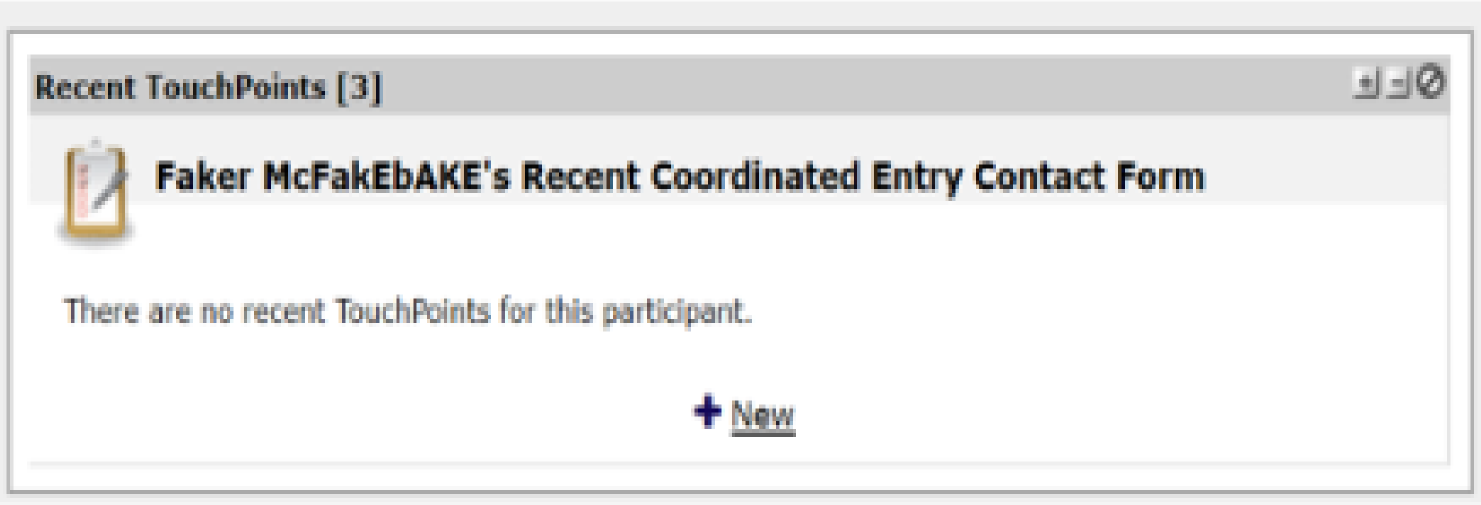
| Take Action | Site | Program | Date Completed | Last Updated By | A-1. At what point is this data being collected? |
|---|---|---|---|---|---|
| | Community Support Network | Sanctuary Villas | 11/27/2020 | Meghan Murphy | Project Exit |
| | Community Support Network | Sanctuary Villas | 11/27/2020 | Meghan Murphy | Project Start |

+ New

**ESG Case Mgmt TP's**

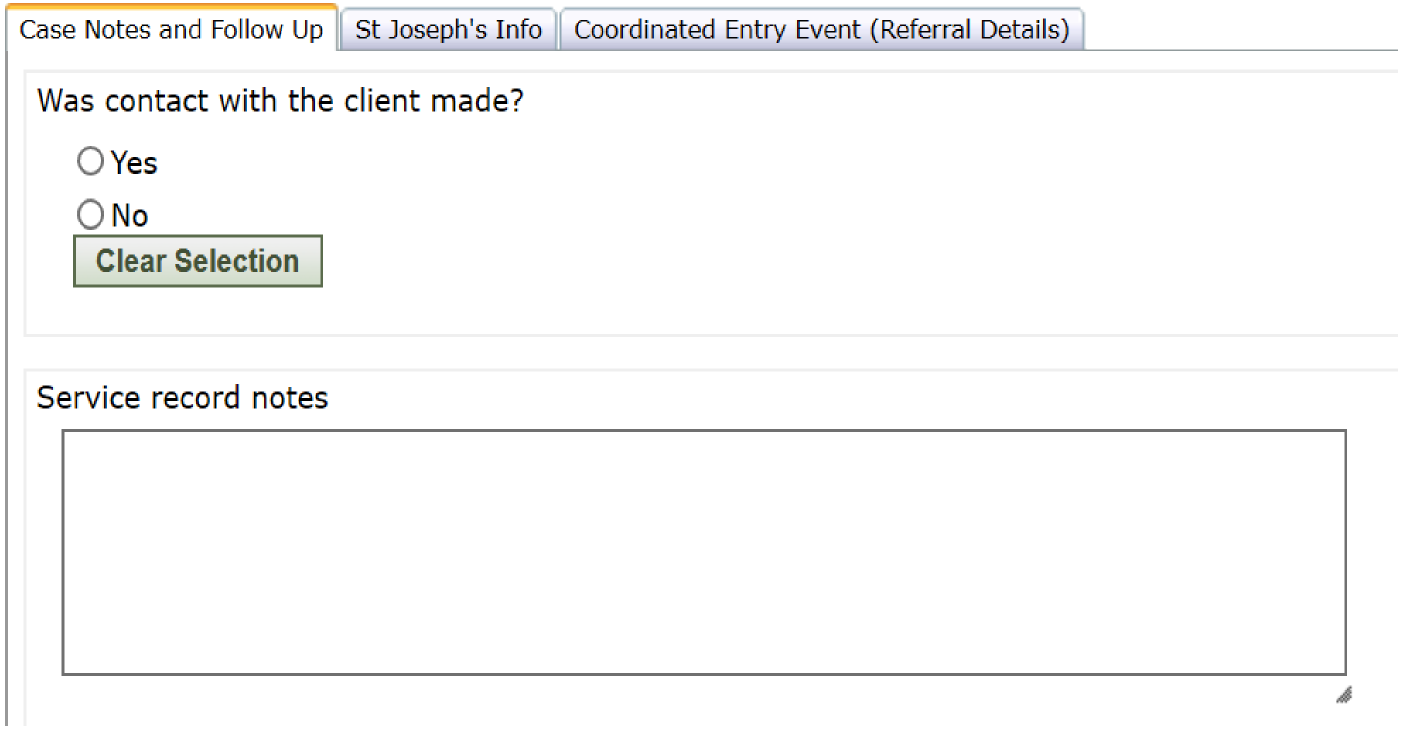
ESG Case Mgmt TP's

**VI-SPDAT FAM TP's (View 2)**




**Step 1:** Enter the CE case note touch point. On EtO HMIS, it is 'Recent Coordinated Entry Contact Form'.

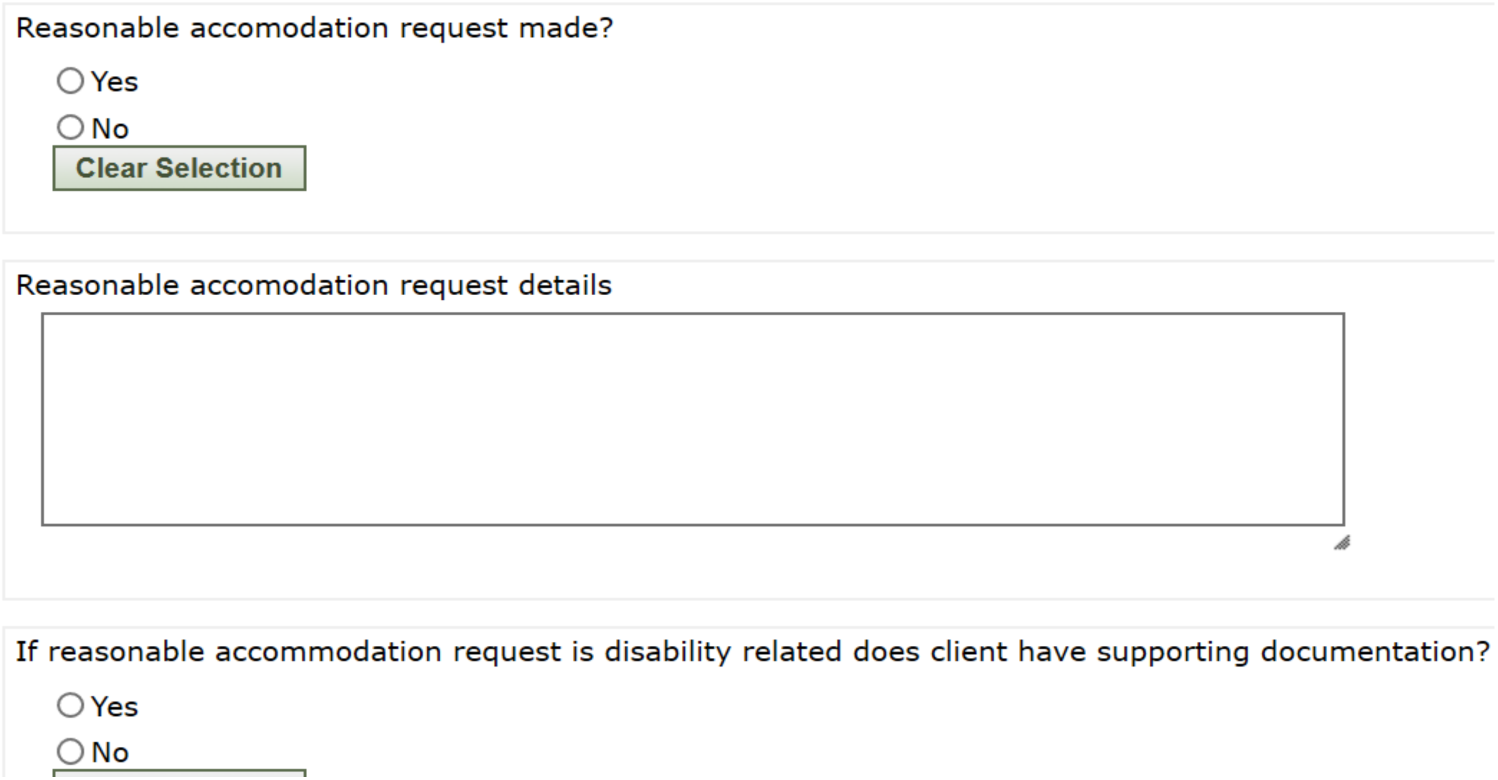
**Step 2:** Enter regular CE case note on the first tab of the case note touch point. If contact was made with participant -




-then mark ‘yes’ for contact made with participant. If attempt to contact ended without speaking with participant or with secondary contact, mark ‘no’.

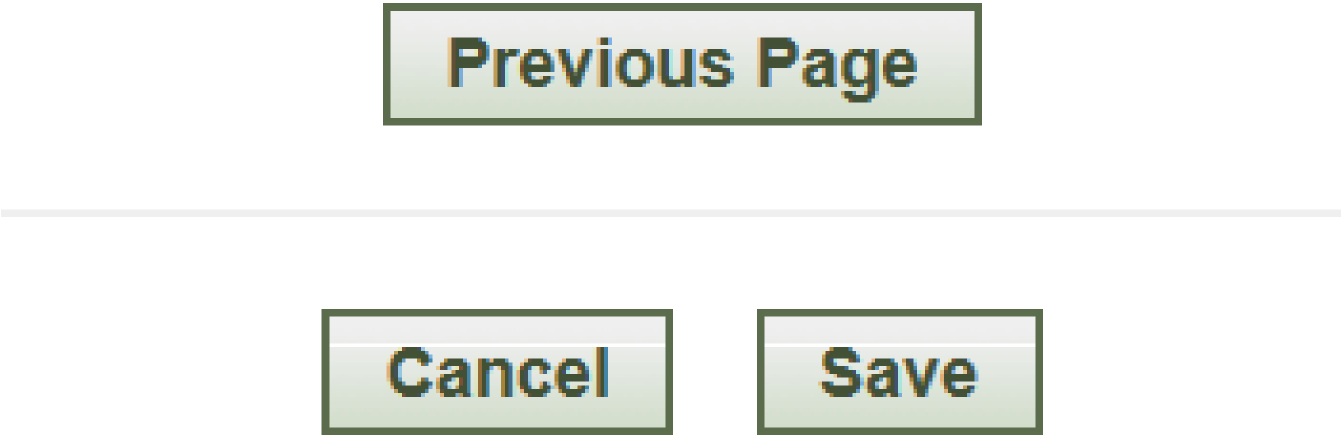
-Ignore the other tabs.

**Step 3:** After entering regular CE case note, note any reasonable accommodations requested. If participant has documentation to support the need of a reasonable accommodation,




answer yes to that question. Any reasonable documentation available during appointment should be scanned and uploaded to the participant's dashboard.

**Step 3:** Save your case note



# CES Assessment Step 5: Collection of Initial Eligibility Documents

# Collection of Initial Eligibility Documents

After completing HMIS Data Entry, scan and upload any initial eligibility documentation into the client's HMIS dashboard

**CES Release of Information (ROI)/Program Agreement – even if you don't have anything else to upload, you must upload this or HomeFirst will delete the client profile**

# Collection of Initial Eligibility Documents

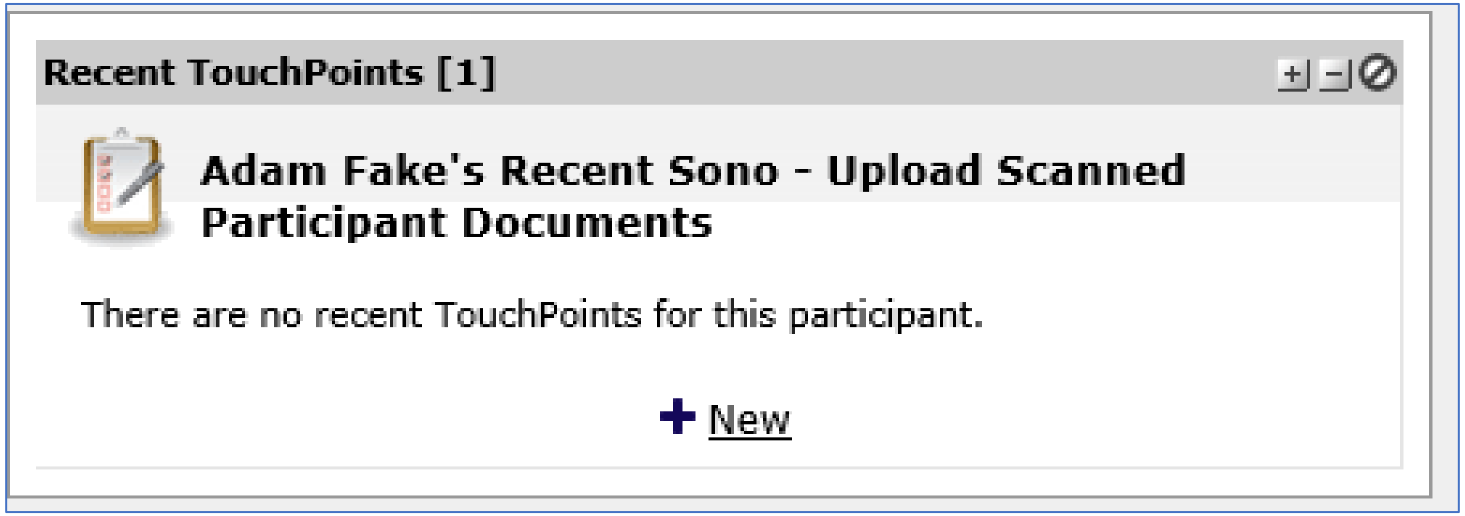
“Eligibility” – referring to eligibility for eventual housing program

Upload documents available at point of assessment, and as staffing time permits, ongoing

Examples:

- ID and Social Security Card
- Homelessness verification letters
- Documentation of disabling condition from a qualified medical provider, or SSI/SSDI letter
- Veteran status verification (DD214, VA disability verification)
- Prison release paperwork
- Income verification

# Uploading Scanned Documents



# Summary of Workflow (order can be changed)

1. Complete Housing Problem Solving Conversation
   i. Assess for eligibility for CES
   ii. Complete a strengths-based conversation to identify housing options other than the homeless services system. Do not continue if options are identified!

- Complete a CES ROI!
- Search in HMIS for: VI-SPDAT within the last year, up to date contact info, and active status on By-Name-List

2. Crisis Navigation, including emergency shelter
3. Complete the Standardized Assessment Tool (VI-SPDAT)
4. HMIS Data Entry:
   i. Create participant profile if none is already created
   ii. Complete the Entry HUD Touchpoint in the relevant CES Program
   iii. Enter the VI-SPDAT
   iv. Enter a case note
5. Upload the CES ROI and Initial Eligibility Documents

# Enhanced Assessment and Prioritization

Scores do not always reflect a client's vulnerability!
Enhanced Assessment and Prioritization allows additional documented information to be presented at Case Conference to assist with more accurately prioritizing the client for openings with the level of assistance they truly need.

More to come!

HOMEFIRST

Where Homelessness Ends™

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