Pennsylvania HMIS (PA HMIS)

Western Continuum Coordinated Entry System Guide

May 18th, 2020

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Introduction

The following provides a guideline to using the Western Coordinated Entry (CE) system through PA HMIS to intake Consumers, perform a screening tool assessment and place them on a Prioritization List for the Continuum to assist in maintaining / achieving housing.

Training Class(es)

Interim Training classes can be found by visiting www.tinyurl.com/Western-PA-CE-Videos

Coordinated Entry Process

The Coordinated Entry process is broken into two steps, the first step is the initial Intake and Assessment of the Consumer/household performed at an Assessment Center. An Assessment Center is any organization or provider that is set up to perform the continuum's screening tool assessment. The second step occurs after the placement on the Prioritization By Name List (BNL), and involves referrals to Service Providers as well as Service Providers actively reviewing and finding Consumers/households on the list in which they can serve through their programs in the Consumer's geographically region.

Intake and Assessment

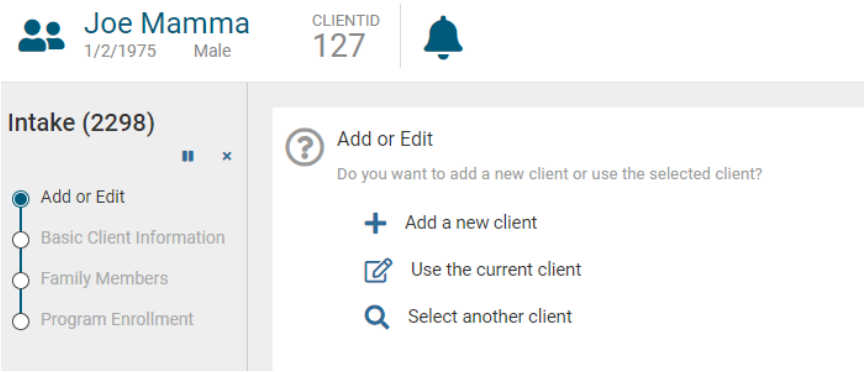
The Intake and Assessment begins with a 211 referral/Consumer Intake. From there, consumers in need of a housing intervention are referred to an Assessment Center where a Triage Assessment is conducted. Consumers in need of immediate intervention are referred to community resources such as Emergency Shelters, Warm Shelters, etc.. Consumers may also be referred to Service Providers for longer term Housing Interventions. A Housing Needs assessment is conducted by either the Assessment Center or Service Provider and the Consumer is placed onto the By Name List. To begin the Intake and Assessment part of the process within ClientTrack, navigate to the Clients tab.

Consumer Intake

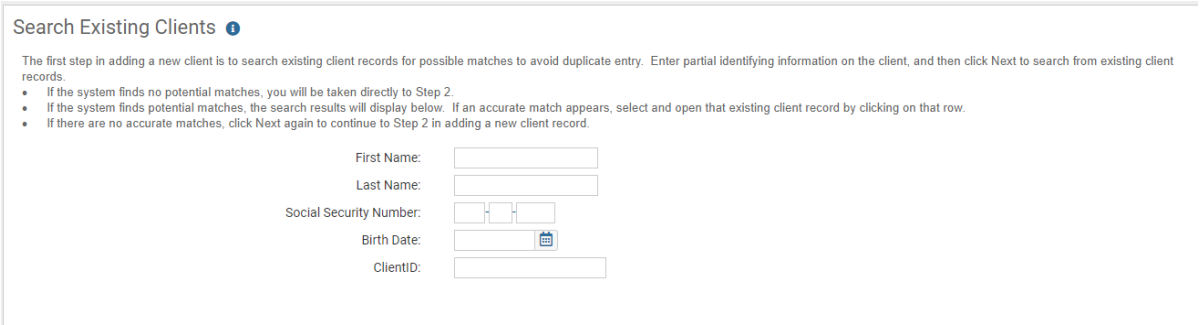
Consumer Intake will be the first step in the intake/assessment process and will allow a user to search for / create a new Consumer in the same step. A Consumer will need to be selected (existing one) or created during this step before moving forward with the rest of the intake which includes the Pre-Screening, and Coordinated Screening Tool steps.

To perform a CE Intake, click on the Intake Icon in the left menu.

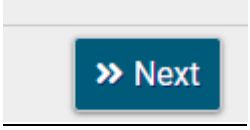
This opens the intake screen with the most recently selected Consumer Record shown.



<u>Add a new client</u> – This opens a new record for the intake. First, you must Search Existing Clients to assure this will not be a duplicate entry. Generally you will want to search for as little information as makes sense, such as First Initial and Last Name. This assures that any close matches will be returned (e.g. an abbreviated first name was entered, or no social security number or birth date were entered originally).



Click the Next button at bottom right of window.



Results of the search are returned in a list beneath the search window, along with instructions for proceeding.

Please address the following:
- Please review the list below for potential duplicates. Click *Next* if this is not a duplicate.

Search Existing Clients

The first step in adding a new client is to search existing client records for possible matches to avoid duplicate entry. Enter partial identifying information on the client, and then click Next to search from existing client records.
- If the system finds no potential matches, you will be taken directly to Step 2.
- If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing client record by clicking on that row.
- If there are no accurate matches, click Next again to continue to Step 2 in adding a new client record.

First Name: J
Last Name: Mamma
Social Security Number:
Birth Date:
ClientID:

1 result found.

First Name	Last Name	Social Security Number	Birth Date	ClientID
Joe	Mamma	555-55-5555	01/02/1975	127

If you do not find a match, Click Next without selecting a name from the list. This will create a new blank record and allow you to enter basic Consumer information.

Basic Client Information

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

First Name: * J
Last Name: * Mamma
Middle Name:
Suffix:
Name Quality: * Full name reported
Social Security Number:
SSN Quality: * Client doesn't know / Client Refused / Data not collected

Basic Client Demographics

Birth Date:
Client Age: N/A
Date of Birth Quality: * Full DOB Reported / Approximate or Partial DOB Reported / Client doesn't know / Client refused / Data not collected
Ethnicity: * -- SELECT --
Race: * American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White, Client doesn't know
Gender: * -- SELECT --
Veteran Status: * -- SELECT --
Show Address and Contact Information:

Family Information

Use this section to collect data about a client's family. The Family search field allows you to search for and select an existing family account. This is appropriate when adding a family member to an existing family.

Family: Mamma, Joe Household
Relationship to Head of Household: * Self

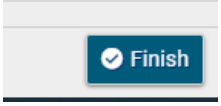
Information Release

- Use this section to collect data about a client's information release.

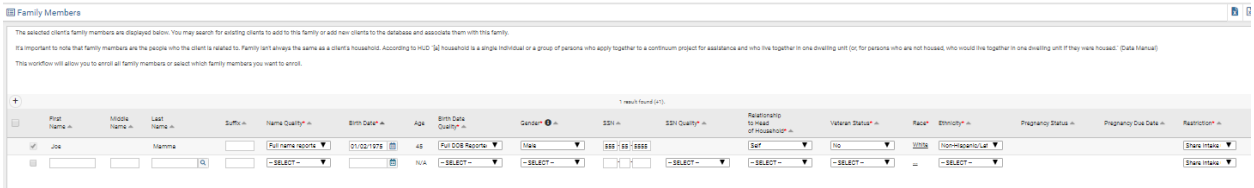
Information Release #: * 1 - Allow Sharing
Begin Date: 05/13/2020
End Date:

If you do find a match, click on the name in the list of matches. You will be taken to this page with information for the selected client already filled in. The same will happen if you selected Use current client on the previous screen.

Once you have entered this information, click Finish at bottom right of screen.



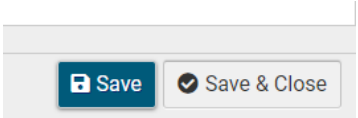
You will proceed to the Family Members section next.



Here, you can enter additional family members. Be certain to select one member and only one member as "Self" or you will receive an error.

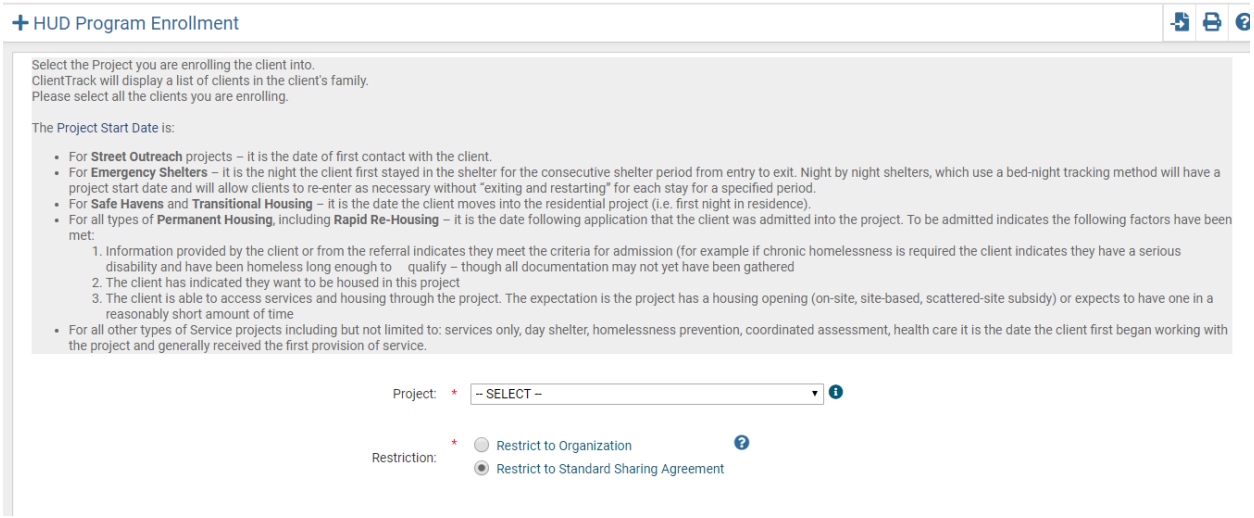
> Household
>
> *Excerpt from the HMIS Data Standards Manual* "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

When finished, click Save & Close from the bottom right of screen (Selecting Save will save your current information but not advance to the next screen).



Program Enrollment

Select the Coordinated Entry Project you are enrolling the Consumer into.



ClientTrack will display a list of Consumers in the Consumer's family. Select all the Consumers you are enrolling. Again, be sure to select one and only one Head of Household ("Self" Relationship).

Household

Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*
Mamma, Joe	Male	45				-- SELECT --
						-- SELECT --
0						

Restriction: * Restrict to Organization / Restrict to Standard Sharing Agreement

Save this screen to finish the Program Intake and move to the Triage/Current Living Situation assessment.

Triage / Current Living Situation

Universal Data Assessment

Default Client's Last Assessment

Universal Data Assessment Information Date: * 05/13/2020

Age while in project: 45

Assessment Type: Entry

Disabling Condition: * Yes

Client Location

Select or enter the CoC code assigned to the geographic area where the head of household is staying at the time of project entry. Client location will be defaulted to the program's CoC within a workflow.

Client Location: * PA-601 - Western Pennsylvania CoC

Living Situation

Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.

Prior Living Situation: * -- SELECT --

Length of stay in the prior living situation: * -- SELECT --

Approximate date homelessness started: *

Regardless of where they stayed last night—Number of times the client has been on the streets, in ES, or SH in the past three years including today: * -- SELECT --

Total number of months homeless on the street, in ES, or SH in the past three years : * -- SELECT --

Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Default Last Insurance Status

Covered by Health Insurance: * -- SELECT --

Type	Status	Reason No	Other Coverage
Private Pay Health Insurance	-- SELECT --	-- SELECT --	
Employer - Provided Health Insurance	-- SELECT --	-- SELECT --	
Individual - Provided Health Insurance	-- SELECT --	-- SELECT --	
Medicare	-- SELECT --	-- SELECT --	
Medicaid	-- SELECT --	-- SELECT --	
State Children's Health Insurance Program (S-CHIP)	-- SELECT --	-- SELECT --	
Veteran's Administration (VA) Medical Services	-- SELECT --	-- SELECT --	
State Health Insurance for Adults	-- SELECT --	-- SELECT --	
Combined Children's Health Insurance / Medicaid Program	-- SELECT --	-- SELECT --	
Indian Health Service (IHS)	-- SELECT --	-- SELECT --	
Other Public	-- SELECT --	-- SELECT --	
Health Insurance obtained through COBRA	-- SELECT --	-- SELECT --	

Restriction: * Restrict to Organization / Restrict to Standard Sharing Agreement

Current Living Situation Information

Current Living Situation: * Place not meant for habitation

Location Detail:

Record Contact:

County or Zip code where you slept last night if known: Pennsylvania | Lawrence County | 16101

Unknown County or Zip

Is there violence or conflict in the place you were staying last night: * No

Is your health or safety at risk in the place you were staying last night: * No

Prioritization Status: * Placed on prioritization list

Restriction: * Restrict to Organization

Restrict to Standard Sharing Agreement

Save this screen to complete the Triage Assessment. At this point you will be given a choice to complete a Housing Needs Assessment.

Assessment Centers should complete a Housing Needs Assessment if:

- Information provided by the Consumer indicates they are literally homeless by HUD definition OR fleeing an unsafe situation and are in immediate need of housing intervention.
- The center has capacity and ability to accurately perform a Housing Needs Assessment.
- The consumer is able and willing to undertake an assessment at this time. Assessments may be performed in person, by phone, or by virtual presence means.

If these conditions are not met it is acceptable for the Assessment Center to refer the consumer to an appropriate Service Provider for completion of a Housing Needs Assessment, provided the consumer is potentially eligible for a Housing Intervention.

If a consumer has immediate Housing needs (e.g. Street Homeless, nowhere to stay that night), the Assessment Center will, at minimum, refer the consumer to appropriate local/regional resources (e.g. Emergency Shelter, Hotel Voucher, Warm Bed Shelter) to mitigate the immediate need. A Housing Needs Assessment may be completed the next day by the Assessment Center or a Service Provider**. It is the Assessment Center's responsibility to assure a consumer is connected to appropriate resources in the community to assure they receive a Housing Needs Assessment in a timely manner if such an assessment is warranted.**