

Coordinated Entry in the CRHMIS Database Desk Guide

This guide is intended to walk through the process of an admission, assessment, event(s), updating current living situation (at points of contact), and discharge of an individual/family in the Coordinated Entry project in the CRHMIS AWARDS Database (www.cares.footholdtechnology.com).

Admission: From the homepage of AWARDS, select your Coordinated Entry Project. On the far left you will select *Census* and then *Intake/Admission* as indicated below.

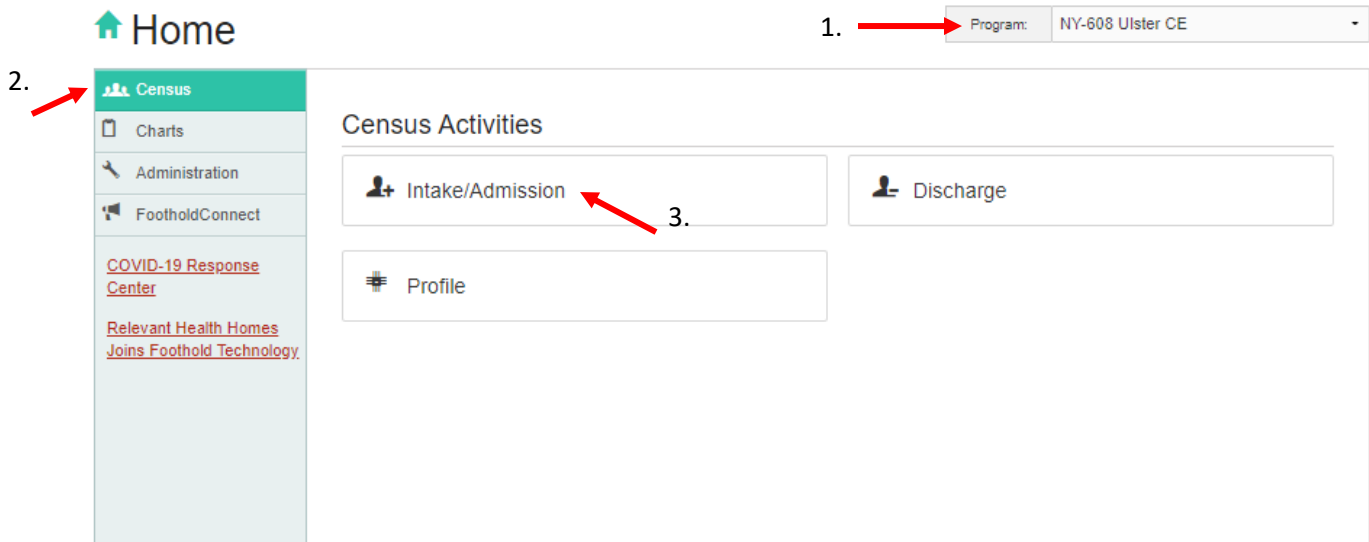


Figure 1

Intake / Admission Search

Program	Database
NY-608 Ulster CE	Data Entry

1. Search for existing referrals using identifying information:

First Name	Last Name	Alias	SSN
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OR enter a screening date range:

Date Range	
08/15/2020	to 02/11/2021

2. Limit the search by selecting the number of referral matches to be displayed on the results page:

Limit Search Results to 25 Matches

On this screen you can select *continue* at the bottom, or if you are admitting a Client that has been discharged you can enter their information to expedite finding their record.

Figure 2

Figure 3, if you are not selecting an individual with a prior admission you will select *Create New Application* as shown below. If re-admitting a person, you can click on their name which will display below *Create New Application*.

NY-608 Ulster CE
Intake / Admission Search Results

Referral Source Type: All Sources
 Referrals Screened From 08/15/2020 to 02/11/2021
 Name = * *
 Application Status: all undecided dispositions - all resolved outcomes

Screened	Applicant	Birthdate	SSN	Status	Updated	Program	Eligibility	Source	Forms Received	Days Open	Admission Date	Discharge Date
?	Create New Application			Screening	?	NY-608 Ulster CE						

Figure 3

Data Entry - Intake Form: The next screen to generate will be the intake form, where all Universal Data Elements are collected. At this time, you should be collecting and entering as much information as possible.

Figure 4 consists of drop-down menus that support capturing the Client’s personally identifying information. Red asterisks (*) indicate required fields.

NY-608 Ulster CE
Intake Form: New Applicant

*Intake Date/Project Start Date: <input type="text" value="02/11/2021"/>	Client Location (Continuum of Care): <input type="text" value="NY-608 - Kingston/Ulster County CoC"/>
Primary Worker: <input type="text"/>	
Information Sharing Level: <input type="text"/>	
Referred By: <input type="text" value="To be determined after referral is created"/> <input type="button" value="Update Referral Source"/>	

* Indicates Required Fields

*First Name: <input type="text"/>	Middle Name: <input type="text"/>	*Last Name: <input type="text"/>	Suffix: <input type="text"/>
*Name Data Quality: <input type="text"/>	Alias: <input type="text"/>	*Social Security #: <input type="text"/>	*SSN Data Quality: <input type="text"/>
*Gender (HMIS): <input type="text"/>	*Birthdate: <input type="text"/>	*Birthdate Data Quality: <input type="text"/>	*Ethnicity (HMIS): <input type="text"/>

***Race (HMIS) [Select all that apply]:**

<input type="checkbox"/> American Indian or Alaska Native	<input type="checkbox"/> Asian
<input type="checkbox"/> Black or African American	<input type="checkbox"/> Native Hawaiian or Other Pacific Islander
<input type="checkbox"/> White	<input type="checkbox"/> Client doesn't know
<input type="checkbox"/> Client refused	<input type="checkbox"/> Data not collected

Figure 4

2 | Page

Figure 5 displays three important fields: *Phone*, *Prior Living Situation* and *Current Living Situation*.

- *Phone* – this field allows for ease of contact when attempting to reach Clients regarding updating assessments, gathering additional information or sharing updates with housing availability.
- *Prior Living Situation* – captures where a client slept **last night**. This plays into the overall determination of chronic homeless status when paired with the other fields that feed into this auto-calculation. If when answering this question, you select a homeless situation from the drop-down menu it will alter the screen to additionally capture approximate date homelessness started, number of times the Client has been homeless (as defined by HUD) and total number of months the Client has been homeless (see Figure 6). **Please note, Chronically Homeless status cannot be calculated until current living situation and disabling condition status are established.*
- *Current Living Situation* – captures where a Client will sleep **tonight**.

Phone:	
<input type="text"/>	
*Veteran Status:	
<input type="text"/>	
Prior Living Situation	
*Type of Residence:	*Length of Stay in Prior Living Situation:
<input type="text"/>	<input type="text"/>
Chronically Homeless (Auto-Calculated):	
No	
Current Living Situation	
*Current Living Situation:	Location Details:
<input type="text"/>	<input type="text"/>
Living Situation verified by:	
<input type="text"/>	

Figure 5 -intake form cont'd

Prior Living Situation	
*Type of Residence:	*Length of Stay in Prior Living Situation:
<input type="text" value="Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)"/>	<input type="text"/>
*Approximate date homelessness started:	
<input type="text"/>	
*(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:	*Total number of months homeless on the street, in ES, or SH in the past three years:
<input type="text"/>	<input type="text"/>
Chronically Homeless (Auto-Calculated):	
No	

Figure 6 - example of homeless situation indicated in "Type of Residence"

Figure 7 allows for the collection of information related to income. If a Client indicates receiving cash income, use the drop-down menu attached to *Income from Any Source* to select *yes*, then complete the follow up *Monthly Income Sources* to calculate their total **cash** income. *Non-Cash Benefits* capture streams of government assistance that do not come in cash form. For example, SNAP (food stamp), Temporary Assistance for Needy Families (TANF) and WIC benefits.

*Income from Any Source:			
▼			
Monthly Income <small>[Read only, Value is determined from income sources entries,]</small>			
\$0.00			
Monthly Income Sources:			
<input type="checkbox"/> Earned Income (i.e. employment income):	□	<input type="checkbox"/> Unemployment Insurance:	□
<input type="checkbox"/> Supplemental Security Income (SSI):	□	<input type="checkbox"/> Social Security Disability Insurance (SSDI):	□
<input type="checkbox"/> VA Service-Connected Disability Compensation:	□	<input type="checkbox"/> VA Non-Service-Connected Disability Pension:	□
<input type="checkbox"/> Private disability insurance:	□	<input type="checkbox"/> Worker's compensation:	□
<input type="checkbox"/> Temporary Assistance for Needy Families (TANF):	□	<input type="checkbox"/> General Public Assistance:	□
<input type="checkbox"/> Retirement Income from Social Security:	□	<input type="checkbox"/> Pension or retirement income from a former job:	□
<input type="checkbox"/> Child support:	□	<input type="checkbox"/> Alimony or other spousal support:	□
<input type="checkbox"/> Other:	□		
*Non-Cash Benefits from Any Source:			
▼			
Non-Cash Benefits <small>[Select all that apply]:</small>			
<input type="checkbox"/> SNAP (Food Stamps)	<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)		
<input type="checkbox"/> TANF Child Care services	<input type="checkbox"/> TANF transportation service		
<input type="checkbox"/> Other TANF-funded services	<input type="checkbox"/> Other source		

Figure 7- intake form cont'd

The collection of health insurance information is captured as seen in Figure 7. If the Client indicates “yes” for health insurance, you will select *yes* from the drop-down menu and indicate which insurances apply.

*Covered by Health Insurance:	
▼	
MEDICAID:	MEDICARE:
▼	▼
State Children's Health Insurance Program:	Veteran's Administration (VA) Medical Services:
▼	▼
Employer-Provided Health Insurance:	Health Insurance obtained through COBRA:
▼	▼
Private Pay Health Insurance:	State Health Insurance for Adults:
▼	▼
Indian Health Services:	Other:
▼	▼

Figure 8- intake form cont'd

The special needs section, *Figure 9*, calculates disabling condition status based on the responses to the red asterisked elements combined with the follow up responses. For the fields *developmental disability* and *HIV/AIDS* it is recognized that these conditions are indefinite therefore there is no follow up response. For the others, disabling condition will only be calculated as yes if *yes* is selected from the drop-down menu for both the special need and the follow up question (OR if income is indicated from SSI/SSDI in the *Income from Any Sources* section).

Special Needs	
*Physical Disability:	Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently?:
<input type="text" value=""/>	<input type="text" value=""/>
*Developmental Disability:	
<input type="text" value=""/>	
*Chronic Health Condition:	Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently?:
<input type="text" value=""/>	<input type="text" value=""/>
*HIV/AIDS:	
<input type="text" value=""/>	
*Mental Health Problem:	(If client has a mental health problem) Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently:
<input type="text" value=""/>	<input type="text" value=""/>
*Substance Abuse:	(If client has a substance abuse problem) Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently:
<input type="text" value=""/>	<input type="text" value=""/>
*Disabling Condition:	
<input type="text" value=""/>	

Figure 9- intake form cont'd

Figure 10 is a combination of required data elements and community-based questions.

Domestic Violence	
*Information Date:	*Domestic Violence Victim/Survivor:
<input type="text" value=""/>	<input type="text" value=""/>
Last Grade Completed:	
<input type="text" value=""/>	

Figure 10- intake form cont'd

The Household Program Enrollment section displayed in *Figure 11* will display additional household members as they are entered and connected to the Client’s record. Complete the remaining questions below *Household Program Enrollment*.

When all information is entered, select *Process Admission*.

Household Program Enrollment

Some of the household fields in this section are automatically updated when household members are added to the Household Composition > Household Program Enrollment section of the Face Sheet. Calculated values will display after the admission has been processed. Calculated fields are based on the Household Composition + Program Enrollment at the time of the Primary Client's admission. Household members with Household Start Dates or Household Program Enrollment Admission Dates after the Primary Client's admission are not included in the calculations.

HMIS Household Type: To be determined	Household Size (Calculated): To be determined
Number of Adults: To be determined	Number of Admitted Adults: To be determined
Number of Children (Calculated): To be determined	Number of Admitted Children: To be determined

Household Program Enrollment:					
First Name	Last Name	Birthdate	Gender	Move In	Move Out
No Data Found					

Non-HMIS Data Elements

***Zip Code of Last Permanent Address** (Enter 99999 if you don't know zip code quality.) [Zip Code Lookup](#)*

Zip Code Data Quality: **Date Left Last Permanent Address:**

Services Sought:

<input type="checkbox"/> Shelter/Housing	<input type="checkbox"/> Drug Treatment
<input type="checkbox"/> Mental Health Care	<input type="checkbox"/> Medical Care
<input type="checkbox"/> Legal Aid - CRJS/Civil	<input type="checkbox"/> Legal Aid - Immigration

Figure 11

Select *Create a new Household* as shown in *Figure 12*, and then *Continue*.

NY-608 Ulster CE
Household Composition
nota person

nota person is currently not in a household.

Create a new Household
 Join an existing Household

Figure 12

NY-608 Ulster CE
Household Composition
Global Household ID: 328199
nota person

First Name	Last Name	Date of Birth	Relation to Primary Client
nota	person	11/09/1981	Self

Would you like to add another member to this household?

Yes No

Figure 13

If there are no additional household members to add, select *No* and *Continue*. If there are additional members, you can do this by selecting *Yes* and *Continue*.

**NY-608 Ulster CE
Household Search
Global Household ID: 328199
nota person**

Enter the first name or last name of the household member you would like to add.
If the member is an existing client you will be given the option to select them to be added to the household.

First Name	Last Name
no	hu

Limit Search Results to 25 Matches

Enter the first and last name of the client, and then select *Continue*.

CONTINUE

Figure 14

**NY-608 Ulster CE
Household Search Results
Global Household ID: 328199
nota person**

Search Criteria	
First Name:	no
Last Name:	hu

The following results were found.
Please select one of the following matches to add to the household.

	First Name	Last Name	Program History(s)	Date of Birth	Gender (HMIS)
<input type="radio"/>	New Record				

* Indicates Required Fields

Living With Household	*Start Date	End Date
<input checked="" type="radio"/> Yes <input type="radio"/> No		

* Indicates Required Fields

CONTINUE

Figure 15

Select *New Record*. This will enable text boxes to appear, allowing entry of the first and last name, date of birth and gender. Next, indicate *yes* or *no* under *Living With Household* and enter the *Start Date*. This should match the head of household's start date.

NY-608 Ulster CE
Household Composition
Global Household ID: 328199
nota person

First Name	Last Name	Date of Birth	Relation to Primary Client
nota	person	11/09/1981	Self
notach	human	***_**_****	

Would you like to add another member to this household?

Yes No

CONTINUE

Admit notach human? ✕

Would you like to admit notach human into this program?

Figure 16

Select *Yes* to admitting *No Person* into this program.

After selecting *Yes*, an intake screen will appear allowing you to complete a full intake for this household member. Once the intake is complete, select *Process Admission* and repeat this process for any additional household members. After selecting *Process Admission* on the final record and the database prompts you to add additional members again, select *No* and *Continue*.

After selecting *Continue* the screen in *Figure 17* will display. Select *Face Sheet*. This will bring you to the *Household Composition* page, which allows designation of relation to primary Client. Once all relationships are entered, select *Save*.

NY-608 Ulster CE
Household Composition - Admissions
Global Household ID: 328199
nota person

Would you like to admit a household member into this program?

	First Name	Last Name	Date of Birth	Relation to Primary Client
✔	nota	person	11/09/1981	Self
○	notach	human	***_**_****	

Figure 17

Assessment: This step in recording Coordinated Entry in HMIS allows the collection of assessment dates and locations, as well as results.

To begin recording an Assessment, start on the homepage in AWARDS and select your Coordinated Entry Project. To the far left of this same page you will select *Charts* then *Services – Individual* as shown below.

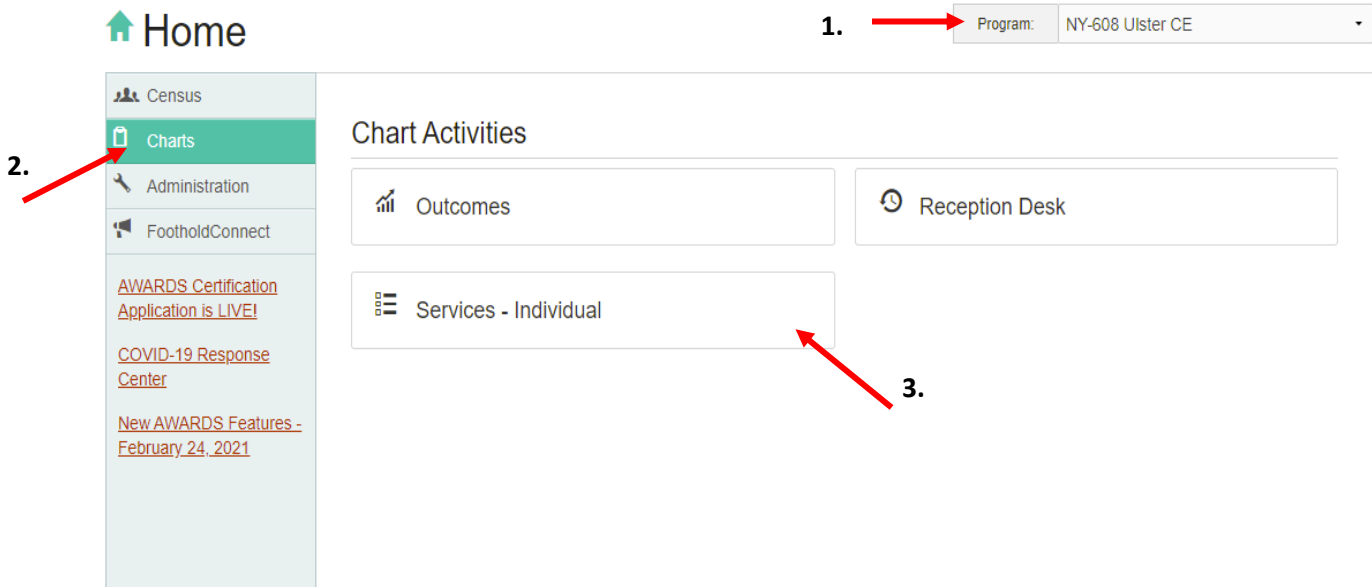


Figure 18 – assessment

After completing the steps in *Figure 18*, a drop-down menu will be available allowing you to select *Forms* and then *HMIS Coordinated Entry Assessment NY-608 2.0* (*Figure 19*). This will bring you to the next screen, *HMIS Coordinated Entry Assessment NY-507 Menu*, as shown below in *Figure 19*.

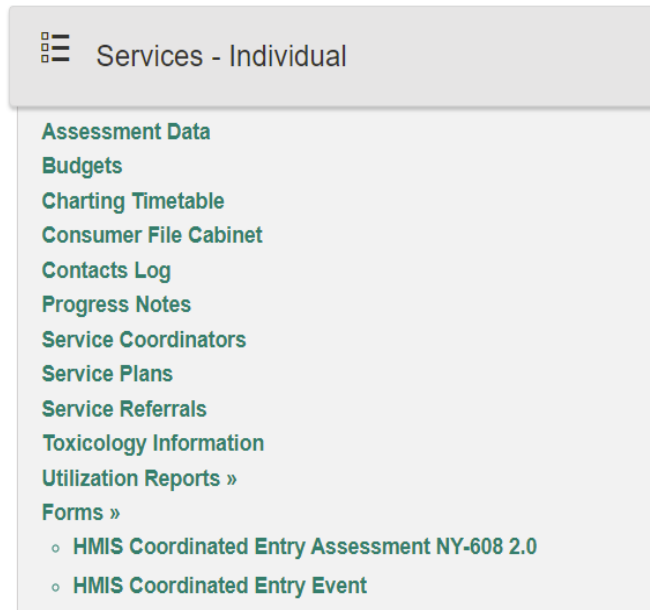


Figure 19 – assessment cont'd

**NY-608 Ulster CE
HMIS Coordinated Entry Assessment NY-608 2.0 Menu**

Consumer	Date Range		
human, notach	12/02/2019	03/02/2021	<input type="checkbox"/> Roster Archives
<input type="button" value="CONTINUE"/>			

Using the *Consumer* drop down menu select the person for which you are completing an assessment and *Continue*.

Figure 20- assessment cont'd

After selecting *Continue*, Figure 21 will display on the next screen. To move forward, select the red highlighted link *Create New HMIS Coordinated Entry Assessment NY-608 for* (in this case) *Human, Notach*.

NY-608 Ulster CE - HMIS Coordinated Entry Assessment NY-608 2.0

notach human

Date Entered	Time Entered	Date of Assessment	Assessment Location	Assessment Type
Create New HMIS Coordinated Entry Assessment NY-608 2.0 for notach human				
<input type="button" value="HMIS Coordinated Entry Assessment NY-608 2.0 Menu"/>				

Figure 21 – assessment cont'd

The entire HMIS Coordinated Entry Assessment will display on the next screen, each section separated by various *Update* buttons. To process the first part of the assessment you must click the *Update HMIS CE Assessment NY-608 2.0 Button*. This will take you to the section shown in figure 22.

**NY-608 Ulster CE
notach human
HMIS Coordinated Entry Assessment NY-608 2.0**

** Indicates required fields.*

*Date of Assessment	<input type="text"/>
*Assessment Location	<input type="text"/>
*Assessment Type	<input type="text"/>
*Assessment Level	<input type="text"/>
*Prioritization Status	<input type="text"/>

Figure 22 – assessment cont'd

(Figure 22 continued)

- *Date of Assessment* reflects the date the information was collected.
- *Assessment Location* is the organization completing the assessment.
- *Assessment Type* collects whether the assessment was completed *By Phone, In Person or Virtually*.
- *Assessment Level* captures the type of assessment being completed, either *Crisis Needs Assessment* or *Housing Needs Assessment*. In your community, you will be completing a *Housing Needs Assessment* as your Coordinated Entry is not utilized for Emergency Shelter Placement.
- *Prioritization Status* captures if the person is being placed on the prioritization list.

Once all intended information is entered, select *Save* and move on to updating the next section of the assessment.

Shown below is *Figure 23*, the *Vulnerability Index* is the final section of the *CE Assessment*. By responding *Yes* to any of the vulnerability questions, the database calculates the points awarded to the question.

NY-608 Ulster CE
notach human
Ulster VI

Ulster VI

Vulnerability scoring

Age 18-24
 Age over 60
 Exiting institutional setting
 Survivor of Domestic Violence
 Fleeing domestic violence
 Is a veteran
 Limited or No income, (below poverty level)
 Criminal history/current probation/parolee/Juvenile justice/Family Court/
 Limitations where the person can live due to disabilities
 Chronically homeless: Homeless for over one year or, Multiple episodes within last 3 years

Disabling Condition

Physical disability
 Chronic Health Condition
 Mental Health
 Substance use disorder
 Developmental Disability
 HIV/AIDS
 Client has a serious underlying medical condition and may be at higher risk for severe illness from COVID-19 due to the following: chronic lung disease, moderate to severe asthma, severe obesity, diabetes, immunocompromised, chronic kidney disease, and/or liver disease

Local Priorities

Receiving services from APS/CPS/Foster Care
 Household member pregnant
 This person is not able to live independently without supports

Total Points

0

[SAVE] [Printable Form]

Figure 23 – assessment cont’d

After selecting *Save*, the *Total Score* displays, and the assessment is complete.

NY-608 Ulster CE
notach human
HMIS Coordinated Entry Assessment NY-608 2.0

Date of Assessment
02/01/2021
Assessment Location
Ulster DSS
Assessment Type
In person
Assessment Level
Housing Needs Assessment
Prioritization Status
Placed on prioritization list
<input type="button" value="Update HMIS Coordinated Entry Assessment NY-608 2.0"/>
Assessment
Vulnerability scoring
• Age 18-24
Disabling Condition
• Mental Health • Substance use disorder
Local Priorities
• Household member pregnant
Total Points
4
<input type="button" value="Update Ulster VI Section"/>
<input type="button" value="Printable Form"/>

Figure 24 – assessment cont'd

Updating Current Living Situation (during points of contact): This element is designed to capture where a person is staying at a point in time. It is intended to be updated at each point of contact and will help track where people are staying throughout their participation in the Coordinated Entry process.

To update the *Current Living Situation*, complete the following steps:
From the *Home* screen select the appropriate *Program*, *Census*, *Profile*, then *Face Sheet* as shown in *Figure 25*.

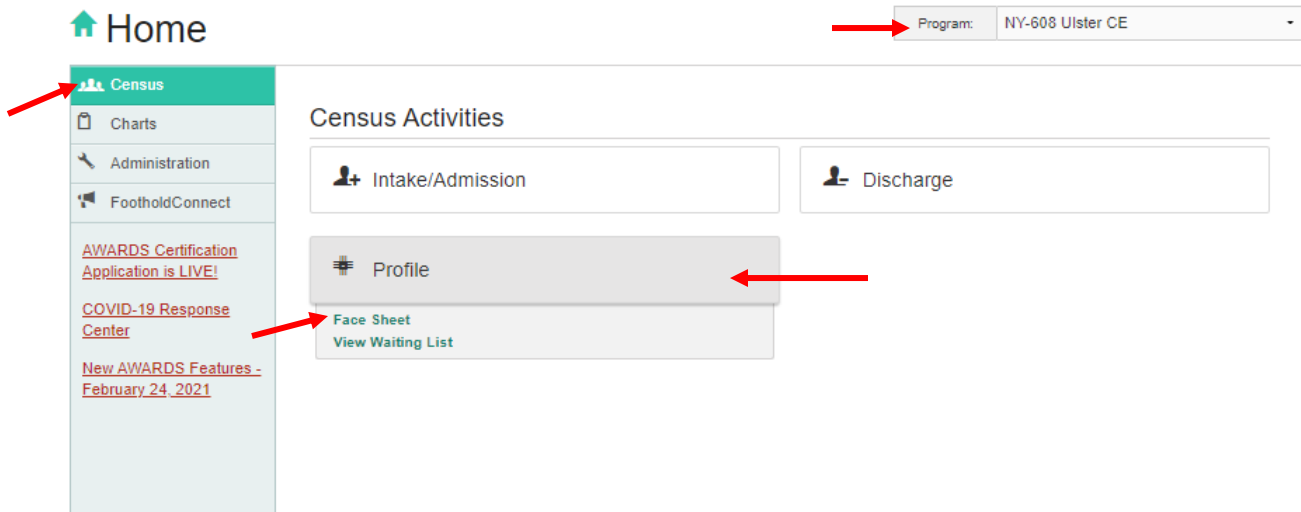


Figure 25 – updating current living situation

NY-608 Ulster CE
Consumer Profile / Face Sheet Update Selection

Consumer:

Roster Archives

Using the-drop down menu, select the person for which you are updating their *Current Living Situation*, and then *Continue*.

Figure 26 – updating current living situation

HMIS Info Update History
None

Once the *Face Sheet* populates the screen, scroll to the middle and select *Update HMIS Info*.

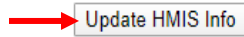


Figure 27 – updating current living situation cont’d

Using the *Effective Date* data entry box, enter the date the information was reported. Access the drop-down menu attached to *Current Living Situation* to indicate where a person is staying at the time of contact. *Living Situation Verified By* provides a drop-down menu of projects within the CoC able to confirm the information. If the project verifying the person’s *Current Living Situation* is not listed in the drop-down menu, *Location Details* would be a good alternative to capture this information.

1.	* Effective Date: 1/1/2021	Annual Update: This client is not yet required to complete an annual update.
	Date of Relevant Anniversary: 01/01	* Client Location (Continuum of Care): NY-608 - Kingston/Ulster County CoC

Current Living Situation	
2.	* Current Living Situation: Emergency shelter, including hotel or motel paid for with emergency shelter voucher, or RHY-funded Host Home shelter
	Location Details: <input type="text"/>
3.	Living Situation verified by: FOW Family Inn
	4. (optional)

Figure 28 – updating current living situation cont’d

Once all information relevant to updating the *Current Living Situation* has been entered, scroll to the bottom of the page and select *UPDATE* as shown below.

HMIS Info Update History
None

After *UPDATE* has been selected, the *Face Sheet* will populate the screen displaying the updated information. This concludes *Updating Current Living Situation*.

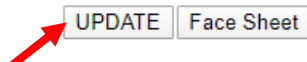


Figure 29 – updating current living situation cont’d



For additional questions regarding this process please reach out to:

Coordinated Entry Team in HMIS: *ceteam*