



Coordinated Entry Program Connector HMIS User Manual

CA-508 Watsonville/Santa Cruz City & County





About this Guide: The purpose of this resource is to provide pointed guidance for specific steps in the HMIS Connector workflow. Please use the table of contents to direct you to specific topics of interest.

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Additional Resources: You can always navigate through the various lessons of the [HMIS Connector Training](#) or reach out to the Help Desk at SantaCruz@Bitfocus.com or (831) 713-2288 during regular business hours.



HMIS CE Overview

02 | CE ENROLLMENT

- Understand Chronic Homelessness

04 | HNA

- H4H prioritizes when "Assessment is Complete and Ready for Scoring"
- New HNA Every 90 Days (Data Will Cascade)

06 | EVENTS

- Log Provided Events (i.e. Services) and Event Results

08 | CLIENT TRANSFER

- Communicate and Confirm with Potential New Connector Prior to Transfer

01 | CLIENT PROFILE

- Household
- Contact
- Location

03 | CLS

- Complete at Enrollment
- During Designated "Assessment Months"
- When Situation Changes

05 | HAP

- Develop with Participant(s) Overtime
- Print for Participant(s)

07 | STATUS UPDATE

- Complete During Designated "Assessment Months"
- When Situation Changes

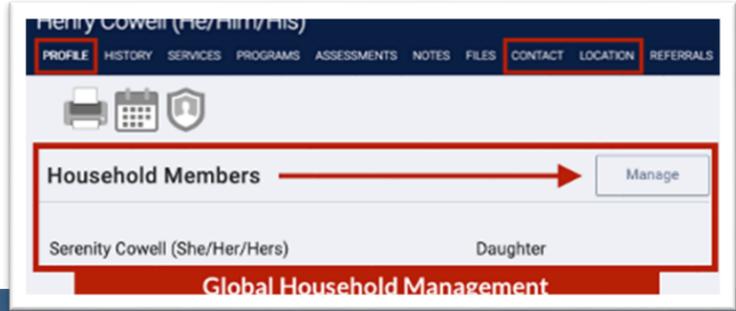
09 | EXIT

- Housed/Housing Program
- Left County (+90 days)
- Institutional Care (+90 days)
- Deceased
- Not Interested in CE Resources
- Unreachable for 30 Days Following First Missed Contact (must follow all engagement strategies in accordance with CE policy)

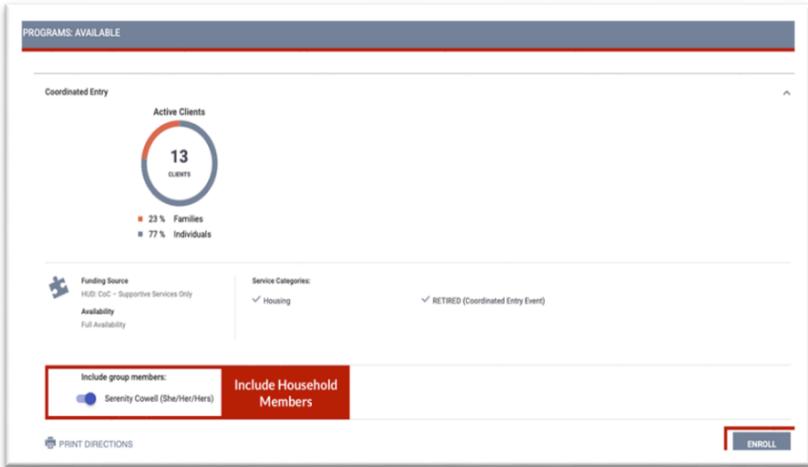
Step 1: Switch into the Housing for Health Partnership Agency.



Step 2: Update Client Profile, Global Household, Contact, and Location



Step 3. Enroll Participant/Household in the Coordinated Entry program from the Programs tab.



Enrollment Fields Used to Determine Chronic Homeless Status*

1. Prior Living Situation
2. Disabling Condition

A chronically homeless person...

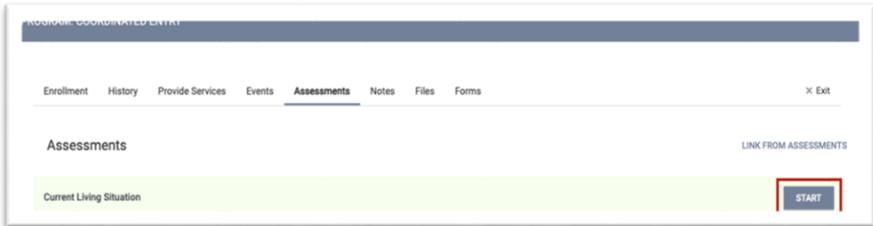
1. Has a disabling condition; AND
2. Currently lives in a place not meant for human habitation, or in an emergency shelter; AND
3. Has been homeless continuously for at least 12 months; OR has been homeless on at least 4 separate occasions for a combined total of 12 months in the last 3 years.

A break in homelessness is...

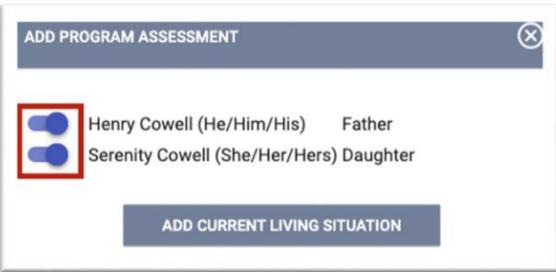
- o 7 consecutive nights of being housed (e.g., “couch surfing,” staying with friends or family, and motels paid for by clients)
- o 90+ days in an institution (jail, hospital, treatment facility, etc.)

**Please note that chronic homeless status alone is no longer a factor in determining queue placement.*

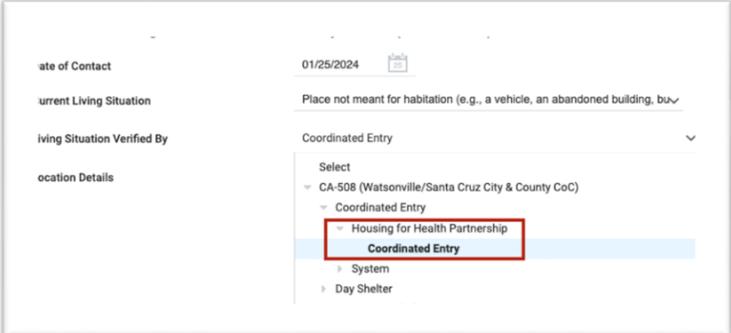
Step 4. Complete a Current Living Situation Assessment as shown in the following steps:



Step 4a. Include household members (if any).



Step 4b. Navigate the “Verified by” decision tree to Housing for Health Partnership’s Coordinated Entry program



Step 4c. Complete this process for additional household members (if any).

IMPORTANT NOTE



The order of the next steps is interchangeable and is ultimately determined by your work with participants and their needs. You don't need to follow the specific order of the next steps outlined below. However, if Step 7 is completed **before** Step 5, the data cascading function will not work.

Step 5. Start a Housing Needs Assessment (HNA) with participant. The HNA should always be completed in the Head of Household's program enrollment.

- Each section has a Housing Action Plan (HAP) Priority toggle. You will toggle this on when the participant identifies a goal related to the specific section. Once toggled on, sections notes will appear in new HAPs.

HOUSING ACTION PLAN PRIORITY

Check here if anything related to health portion is a high priority for us to work on together to help you get a permanent place to live.

- These 3 [Live Markers](#) are populated with data from the client's profile and/or global household. If any of the 3 Live Markers are incorrect, you must update the client profile and/or the household.

1. Total # of members in the household currently. (This field is auto-calculated from HMIS. If different than expected, edit global household associated with participant's profile): 2

2. Total # of children in the household currently. (This field is auto-calculated from HMIS. If different than expected, edit global household associated with participant's profile): 1

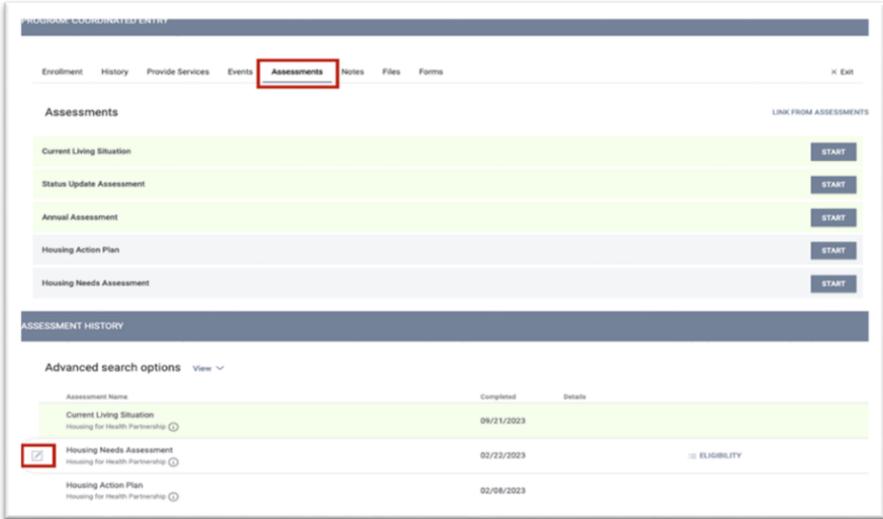
3. Total # of members in household desired (including the participant): Complete Household Comments if the numbers in #1 and #3 are different. 2

4. Household Comments:

5. Age of participant (head of household): 19

Step 6. Edit or Complete a Housing Needs Assessment.

Select the “Assessments” tab of the program enrollment record. Select the “Edit” icon to update the HNA. You will edit the Housing Action Plan in the same way once you get to that step.



- Once all required questions are completed, the “Assessment is complete and ready for scoring” toggle will reveal. Toggling this field ON and pressing save is what notifies the H4H team that this participant is ready to be reviewed for resource matching. Always remember to save the HNA before exiting the screen.

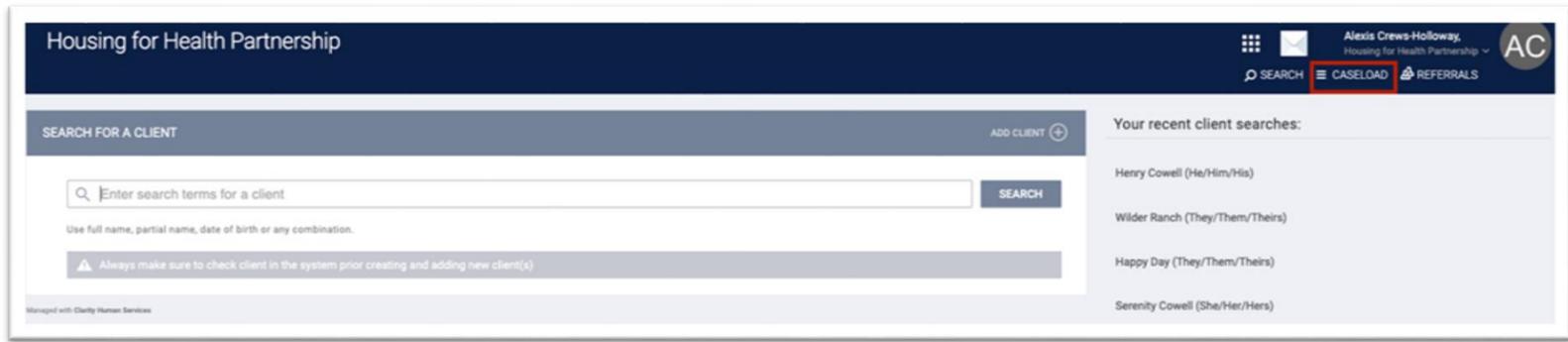


IMPORTANT NOTE

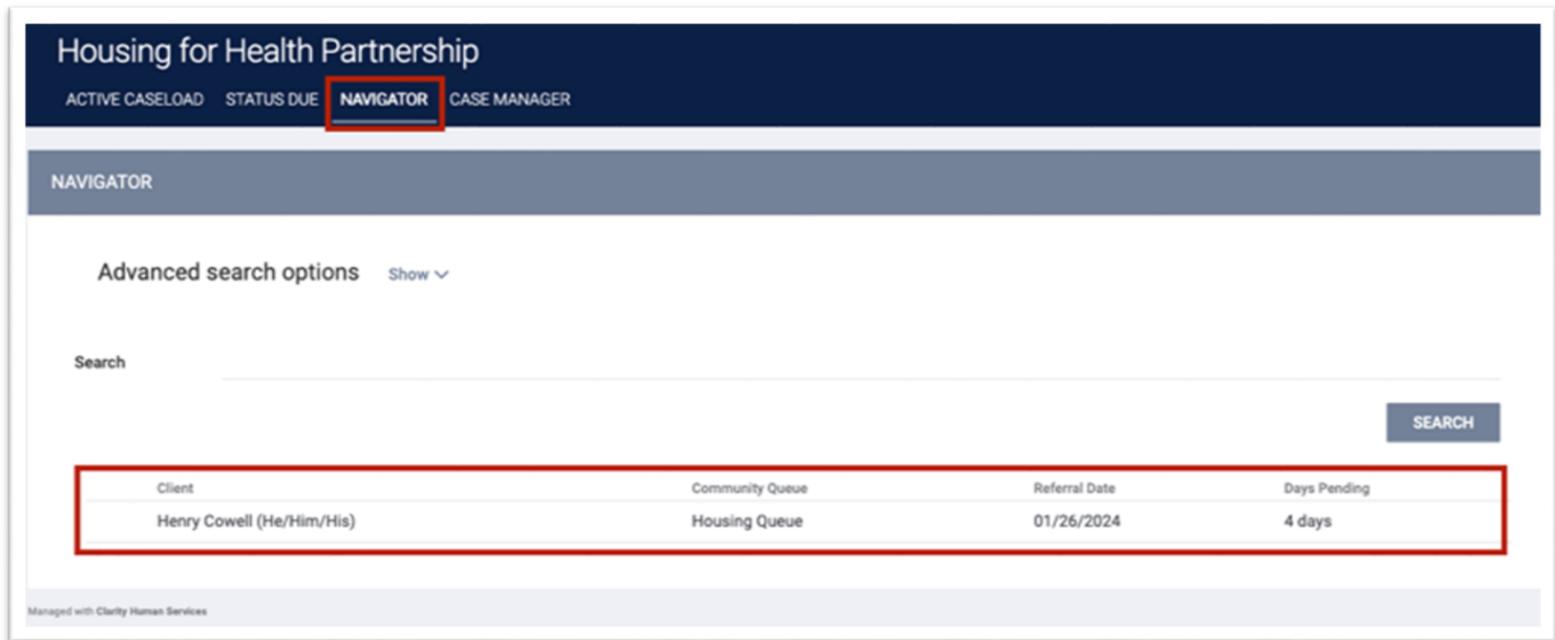


Create a new HNA if the participant’s situation changes, or at least every 90 days from the date of enrollment. For example, changes to household composition would be particularly important. New HNAs must be completed and saved with the “Assessment is complete and ready for scoring” field toggled on for a new score to generate and be sent to H4H for review.

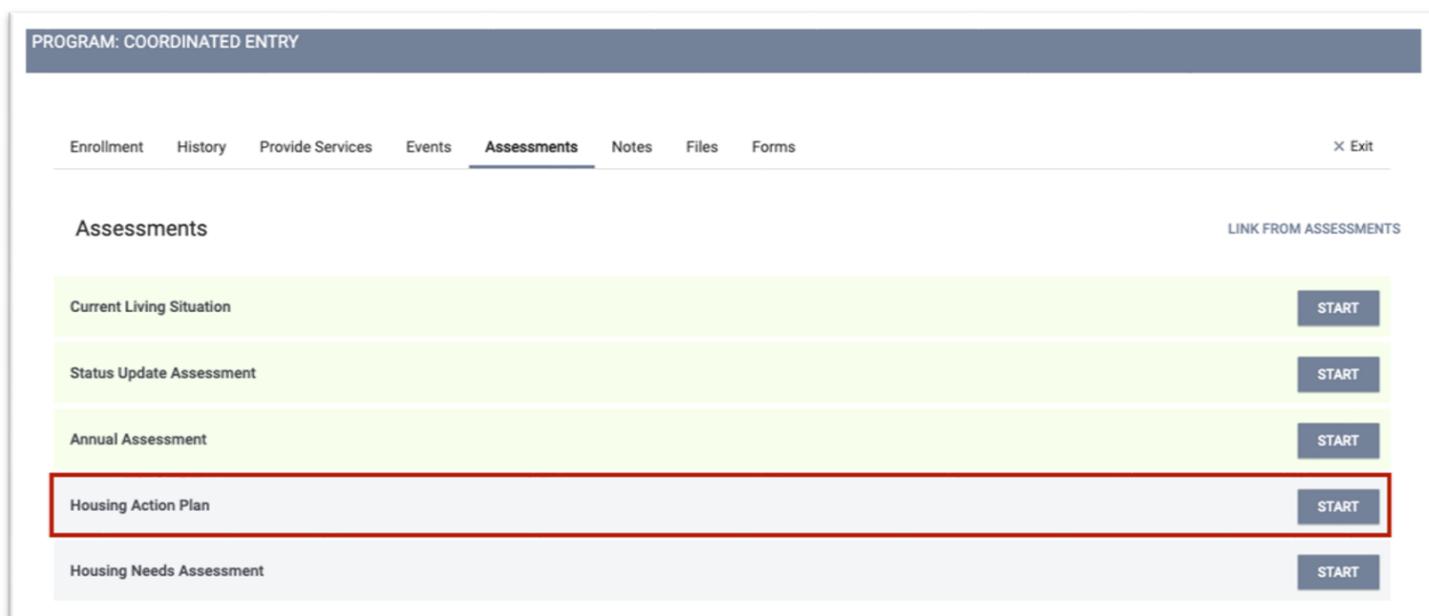
Step 7. Check your Navigator caseload weekly to see if a participant has been referred to the Housing Queue by selecting “Caseload.”



- Select the “Navigator” tab. A participant is not on the Housing Queue if they do not appear here. You are expected to continue to provide Connector Services with all your participants, regardless of whether they have been added to the Housing Queue.



Step 8. Start a Housing Action Plan (HAP) with the participant. The HAP should always be completed in the Head of Household’s program enrollment.



- Assessment Date, Connector Name, and the section notes related to the specified action plan priorities from the HNA will cascade into the HAP.



HOUSING ACTION PLAN

▲ The Housing Action Plan or HAP is a plan developed from the household-directed housing stability goals identified during the completion of the Housing Needs Assessment. The HAP is meant to be a resource that facilitates the collaborative process between households and H4HP Connectors by which they work together to secure housing for the household. The HAP should include a small number of goals and can be updated to include additional goals as progress is made.

Assessment Date: 01/26/2024

Connector Name: Alexis Crews-Holloway

Section 1: Household Goals

Notes: This is where you will take notes related to the Participant's household composition. This section will populate into the Housing Action Plan if the associated priority toggle is on.

- Work with the participant to flesh out the details of the specific goal they wish to achieve, how you will assist, and by when these tasks will be completed.

Goal:

Participant Strengths (Current and Past):

Resources Needed to Achieve Goal:

Participant Will...:

By When:

Connector Will...:

By When:

- The HAP is a living document. You should update dates and goal status as needed. A goal can be in the following status at any given time:
 - Not Started,
 - In Progress,
 - Achieved,
 - Progress Stalled, or
 - Abandoned for New Goal.
- You should add new goals as needed.

Goal Status: Select

Goal Status Notes:

Add Household Goal

Step 9. Print the participant's Housing Action Plan from their client Reports.

- Run the [SZ-101] Housing Action Plan Report. The report will only display goals that are “In Progress” or “Stalled.”

The screenshot shows the client profile for Henry Cowell (He/Him/His) in the Santa Cruz County Housing for Health Partnership system. The 'CLIENT REPORTS' section lists various reports, with '[SZ-101] Housing Action Plan Report' highlighted. An inset shows the report content, which includes:

Housing Goals	
Goal	Creating a rental history
Participant Resources	Participant has a good, working relationship with her landlord. She also has never been formally evicted and has been a resident of Santa Cruz County her whole life.
Resources Needed	She needs a working phone and needs to utilize her free timeoff days to reach out.
Participant Will	Participant needs to reach out to her landlord and ask for either an 'on call' phone call reference or a formal rental reference letter from her landlord.
By When	03/28/2023
Connector Will	Provide sample rental application and start to build one together. Connector will also walk through free credit counseling service that Housing Matters recently made contact with.
By When	04/04/2023
Goal Status	In Progress

Health Goals	
Goal	Establishing counseling, for domestic violence support and mental health.
Participant Resources	Participant knows that she needs to take time to process her DV trauma. She is her own best resource on her own mental health. She has also accessed resources like these before through Walnut Ave Clinic.
Resources Needed	Participant needs time from work to access these services.
Participant Will	Call Walnut Ave to ask about group therapy session times and if she can keep receiving support.
By When	
Connector Will	Reach out to Monarch to see if participant can receive shelter or support from them.
By When	04/19/2023
Goal Status	In Progress

Step 10. Log Coordinated Entry Events.



Select the Event you would like to log, including household members if appropriate, and fill in the requested data.

For Problem-Solving Event items, there is an additional field shown in the screenshot above.

Indicate if the participant

was housed in a “safe alternative location” which means permanent housing in this community. The participant should be exited from the CE program at that point.

Step 11. Complete Standard HMIS Assessments pursuant to local policy.

	At Program Enrollment	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Current Living Situation (CLS) Assessment	Yes	No	Yes	No	No	Yes	No	No	Yes	No	No	Yes	No
Status Update (SU) Assessment	No	No	Yes	No	No	Yes	No	No	Yes	No	No	Yes	No

Current Living Situation (CLS) Assessments

Required to be completed at program enrollment AND during each of the designated assessment months of February, May, August, and November. Additionally, it is requested that you complete a CLS Assessment if a client’s living situation undergoes a major change.

Status Update Assessments

Required to be completed during each of the designated assessment months of February, May, August, and November. Additionally, it is requested that you complete a Status Update Assessment if there is a major change to a client’s health, income, benefits, and/or insurance status.



Annual Assessments

Required to be completed in lieu of a 4th quarter Status Update Assessment. This should be a rare occurrence as Connectors shouldn't be working with participants longer than 90-180 days.

Step 12. Transferring a Participant to a New Connector

When a secondary system enrollment is managed by a case manager who is also a Connector occurs, the Coordinated Entry enrollment must be reassigned to the Connector of the secondary enrollment, unless this Connector does not have capacity, or the participant prefers to continue with their original Connector.

There are two potential transfer scenarios you may encounter.

1. You are transferring an enrollment to another Connector.

- Confirm the Home Agency of the Connector you wish to transfer the participant's enrollment to.
- Send a secure message in the HMIS to the new Connector requesting they reassign themselves as the Assigned Staff in the participant's CE Enrollment.
- The new Connector will receive an automatic notification in their standard email that they have a new secure message in the HMIS.
- Confirm the enrollment has been reassigned to the new Connector. The new Connector should respond to your email request informing you

CREATE A MESSAGE

CoC: Watsonville/Santa Cruz City & County CoC

Agency: System

Receiver: Melissa Sutton-Dement

Body:

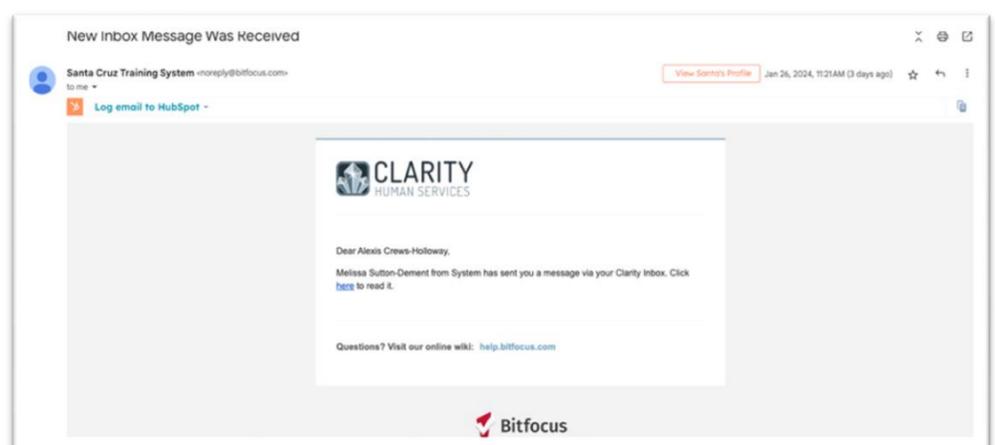
Hello Melissa,

Participant BC5A5AA42 and their household members have recently enrolled in an Emergency Shelter you are assigned to. Are you a trained Connector? If so, can you please reassign yourself to their Coordinated Entry enrollment? You do this by editing the assigned staff section in the CE enrollment. You will deselect me and select yourself. You are now their new Connector until they receive another Connector Transfer, move into housing, or exit the program for another qualifying reason.

Please advise if you are **not** a trained Connector and I will maintain management of this enrollment. Thank you!

body p

SEND MESSAGE CANCEL



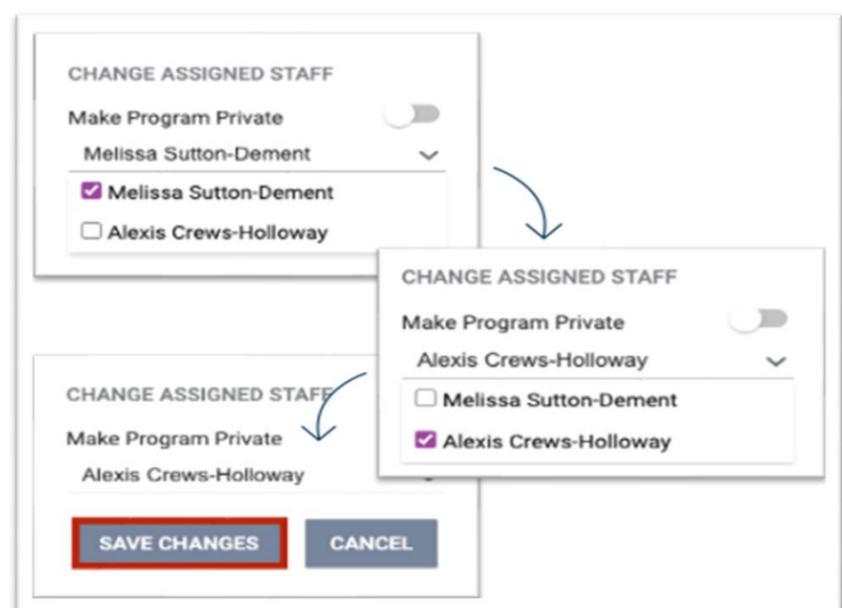
that they have reassigned themselves as the new Connector. If the new Connector is unresponsive after multiple attempts to contact them, reach out to Monica.Lippi@santacruzcountyca.gov.

2. You are receiving an enrollment transfer from another Connector.

- Review the incoming message from your fellow Connector. You will receive an automatic notification in your standard email that you have a new secure message in the HMIS, as shown in the screenshot above.
- Once you confirm the enrollment transfer is appropriate, navigate to the assigned staff section of the participant's CE Enrollment.



- Deselect the outgoing Connector and select yourself. Press "Save Changes."



- Send a secure message in the HMIS to the outgoing Connector with an update. You may either reply directly to their initial message or send a new secure message in the HMIS.

Step 13. Exiting a Participant from Coordinated Entry

A participant should be exited from the Coordinated Entry program for the following reasons:

- They move into any type of permanent housing or enroll into an HMIS housing program.
- They leave the County without the intention to return within 90 days.
- They are in institutional care (hospital, jail, etc.) for longer than 90 days.
- They become deceased.
- They are no longer interested in being considered for any



resource within Coordinated Entry.

- They have been unreachable for 30 days following the first

missed contact, despite all engagement strategies being applied in accordance with CE policy.

IMPORTANT NOTES



1. The average length of time a Connector should work with a participant/household is 6 months. Exceptions apply for participants on the housing queue and whom have not yet had a successful housing program referral.
2. If you need to exit participants that are on the queue, please contact the H4H Connection Services Team. H4H will make efforts to find alternative Connectors for their transfer.
3. There are 2 non-traditional HMIS programs that participate in CE outside of the Coordinated Entry program in Housing for Health Partnership's agency: CAB's Recurso de Fuerza program, and Housing Matters' Street Outreach CE program. Please contact H4H Connection Services Team should you have a traditional Coordinated Entry enrollment in H4HP that needs to be transferred to one of these outside CE programs.
4. Participants will be **automatically exited** from the Coordinated Entry program if no program-related activity has been recorded after 90 days. Should an enrollment *inadvertently* auto-exit due to lack of program-related activity, you may reopen the program using the [Reopen Client Program](#) button on the client's Program Exit screen. If the participant *legitimately* auto-exited, you should complete a new enrollment* into Coordinated Entry.

**Please note that a new HNA would need to be completed with the new enrollment, which will impact the participant's place on the queue.*

More Information on Auto-Exits:

Participants must have program-related activity in at least one of the following areas within 90 days to avoid being automatically exited:

1. Coordinated Entry Enrollment
2. Completing a HNA or HAP Assessment
3. Editing a HNA Assessment
4. Status Update Assessment
5. Current Living Situation Assessment
6. Coordinated Entry Event
7. Coordinated Entry Event Result



8. Adding or editing a location for the participant on the [Location Tab](#)
9. Adding or editing a contact for the participant on the [Contact Tab](#)

For more information on Santa Cruz County's Coordinated Entry System, please visit the [Housing for Health Partnership](#) website.

Step 14. Locating Paper Forms

While you are encouraged to complete direct data entry into the HMIS, you may also use paper forms for the collection of data.

For paper forms related to the HMIS Connector workflow, please visit the following webpages:

1. [Consumer Information Sharing Authorization](#)
2. [Unable to Obtain Consent Form](#)
3. [Revocation of Consent to Share Data](#)
4. [Standard HMIS Forms for Adults and Children](#)
5. [Housing Needs Assessment and Housing Action Plan](#)
6. [Client Grievance Form](#)
7. [Notice of Agency Possession of Sensitive Documentation](#)
8. [HMIS Quarterly Assessment Policy](#)

These forms and more information related to the community's HMIS can always be found at the HMIS Support Website, santacruz.bitfocus.com.