New Hampshire Coordinated Entry Guide for Bitfocus Clarity

Institute for Community Alliances

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NH HMIS: From ServicePoint to Clarity
Please reference this translations chart while reviewing this guide
and in your future work in Clarity!

Terms for End Users

Wellsky - ServicePoint	Bitfocus – Clarity Human Services
Parent Provider	Agency
Project/Provider	Program
Entry/Exit (E/E)	Enrollment
Interim Review – Update	Status Assessment – Status Update Assessment
Interim Review – Annual Assessment	Status Assessment – Annual Assessment
ShelterPoint	Attendance Module
Case Managers Tab	Assigned Staff
Summary Tab	History
Entry/Exit tab	Programs tab
Canned Reports	Report Library
File Attachments	Program Files/Client Files

NEW HAMPSHIRE COORDINATED ENTRY GUIDE

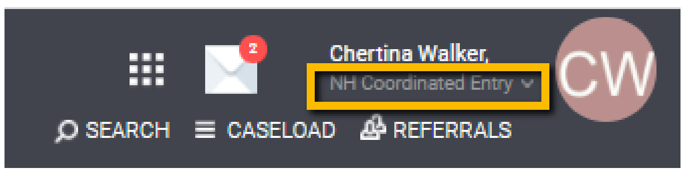
This guide is specific to the New Hampshire Coordinated Entry Program workflow. It is intended to be used only by service providers trained and certified to complete Coordinated Entry Program work in New Hampshire. For guidance with more basic functions in Clarity (i.e., searching for a client, creating a household, etc.), please refer to ICA's more comprehensive guide, *New England HMIS End User Guide for Bitfocus Clarity*.

GETTING STARTED

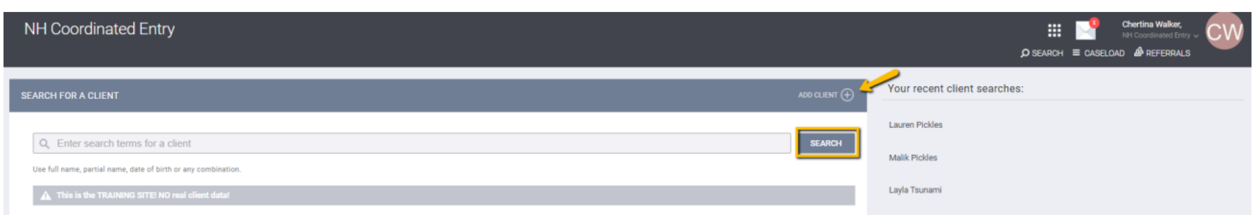
When doing any Coordinated Entry work in Clarity, you must first switch from entering data under your agency to entering data as a **NH Coordinated Entry** user.

- In the top right corner of your screen, under your name, your agency will be listed.

1. Select: **the down arrow** and choose the NH Coordinated Entry Agency.
   - This agency includes all 3 CoC Coordinated Entry Programs
   - You are now entering data as a NH Coordinated Entry user



2. Once in the NH Coordinated Entry Agency, you will search for your client in the system.
   - If the client is already in the system, be sure to check the accuracy of the client's profile, and household information.
   - If the client is not currently in the system, click the "ADD CLIENT" plus sign and enter the client in the system.



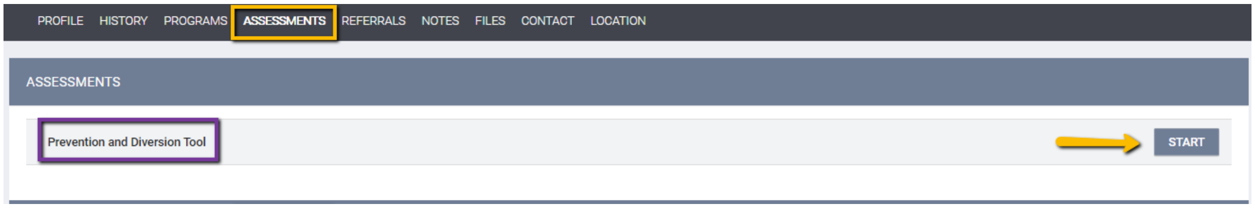
For detailed instruction on entering a client and checking the accuracy of a client's data, please refer to ICA's more comprehensive guide, New England HMIS End User Guide for Bitfocus Clarity

PREVENTION & DIVERSION TOOL

211 staff, street outreach staff and housing navigators will administer NH Prevention and Diversion Tool (PDT) to people seeking assistance at the regional access points or via phone call. The PDT is used to determine appropriate services and assistance needed to resolve homelessness. If homelessness is not resolved within 14 days, the housing navigator must give the client an enrollment into Coordinated Entry to be placed on the prioritization list.

COMPLETING THE PDT

1. Once in the client's profile, navigate to the assessments tab where the Prevention and Diversion Tool is located and click start.

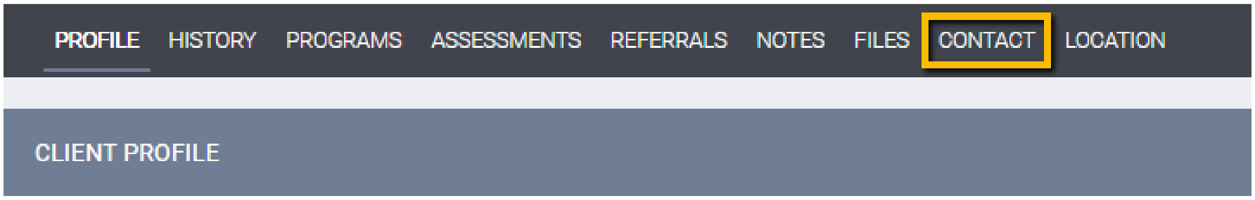


2. Complete the assessment questions.
   - *Assessment Date*: Date the assessment was completed.
   - *Assessment Location*: The agency who did the assessment.
   - *Assessment Type*: The way in which the assessment was conducted.
   - *Assessment Level*: This will always be "Crisis Needs Assessment" for the PDT.
   - *Name of Staff Completing the Assessment*: Enter your name
3. Collect verbal permission from the client to enter their information
   - If client does not give permission to share their data, toggle on the **Private** at the bottom of the assessment to ensure the data is not able to be seen by any other agency.
4. Complete the remaining questions
   - *Current living situation:* Choose the appropriate living situation
     - Additional note boxes will populate depending on the response to their current living situation.
     - Please provide a short description of their living situation and the contact information for the client.
   - *City/Town:* Enter the city/town client is currently located in.
   - *Currently fleeing or attempting to flee:* Choose Yes/No. Please refer to DV manual if needed.
     - If yes, *is client feel safe:* Choose Yes/No
     - (***Ensure immediate safety needs met prior to assessment process***).
   - *Anyone in the household served in military:* Choose Yes/No
   - *Have own Transportation:* Choose Yes/No
   - *Do you believe you will become homeless in the next 7 days:* Choose Yes/No
   - *What brought on your hosing crisis:* Choose the appropriate response
     - Include 2-3 sentences about client's situation
   - *Is there anyone else you and your family could stay with for at least the next three (3) to seven (7) days, if you were able to receive case management services/transportation/limited financial support?:* Choose Yes/No
   - *Total Monthly Income:* Enter client/household's monthly income.
   - *Regional Access Point referring to:* The RAP the client is being referred to.
   - *Households Members:* How many household members and the age of each one
   - *General Notes on Referral:* Include anything helpful for other staff that client may work with in the future.

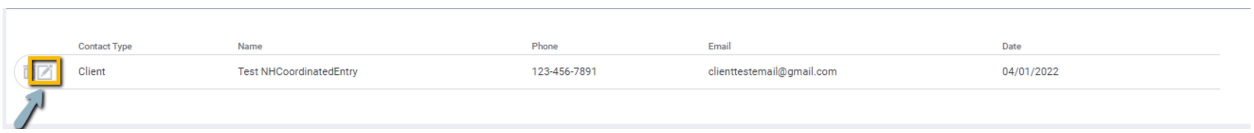
CONTACT INFORMATION

ADDING CONTACT INFORMATION

1. Once you have ensured the client's household is accurate, next move to the **Contact tab** on the client's profile and check the accuracy of that client's contact information.



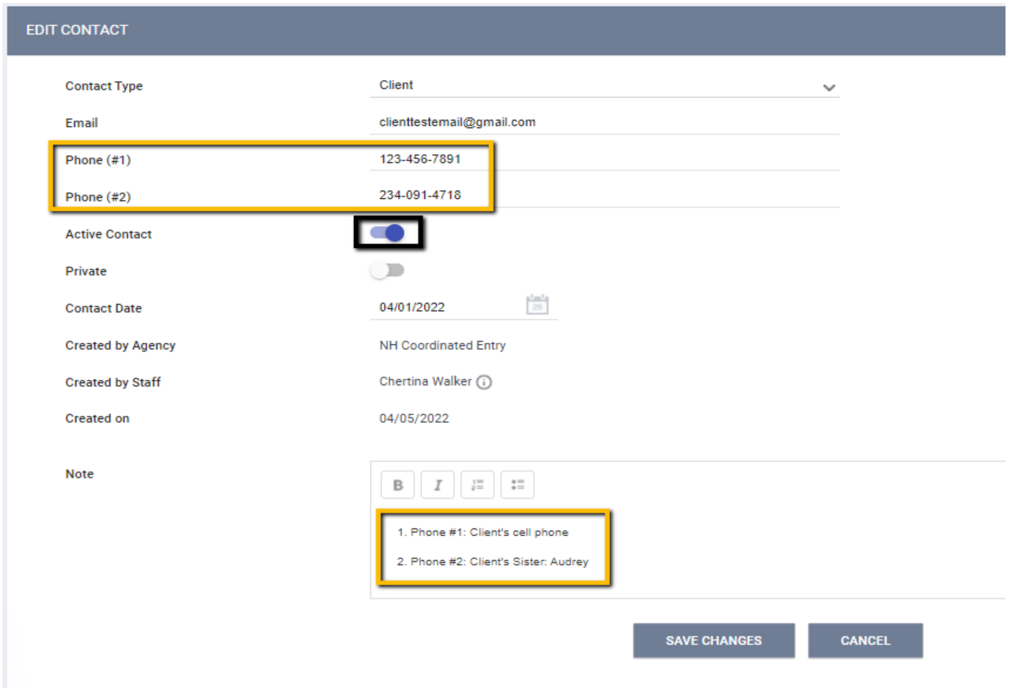
2. **Add Contact** to enter new information if the Contact tab is not filled out.
   - To view or check the accuracy of a contact that has been previously entered, select the edit icon to view that specific contact entry screen.



EDITING CONTACT INFORMATION

1. If the previously entered Contact information is no longer accurate, select the edit icon.
   - Do not delete only contact information. Untoggle the "Active Contact" button so that it is no longer blue. This indicates that this specific contact entry is no longer the most updated contact information for the client.
   - Save Changes.

2. Add Contact and add the new contact information for the Client.
3. In the note box at the bottom of the screen, provide the identifying information for both phone numbers listed. Include an email address if applicable. *(Example below)*
   1. Phone #1: Client's cell phone
   2. Phone #2: Client's sister: Audrey



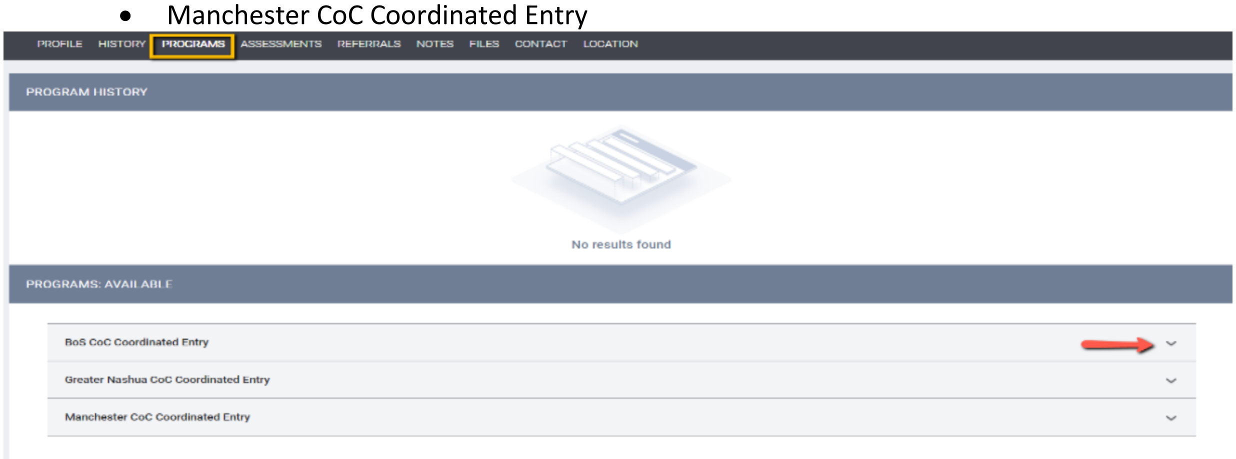
COORDINATED ENTRY ENROLLMENT

For a client / household to show up on the Priority List Reports, they must have the following:

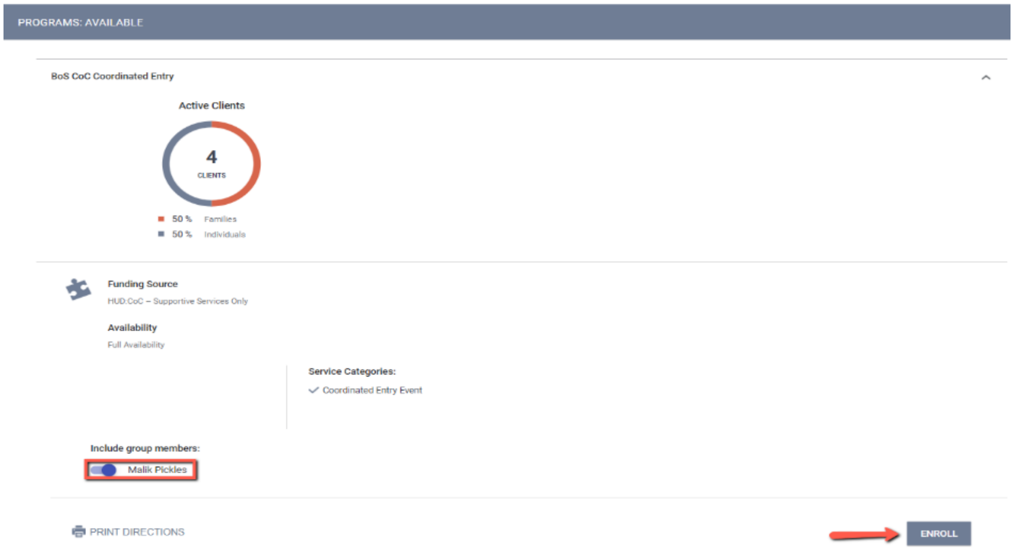
- An **Active** enrollment in a Coordinated Entry Program
- A referral to the appropriate Community Queue

ENROLLING A CLIENT OR HOUSEHOLD

1. Navigate to the "Programs" tab where you will see all available programs.
   - BoS CoC Coordinated Entry
   - Greater Nashua CoC Coordinated Entry
   - Manchester CoC Coordinated Entry



2. Select the CoC client is currently located in
3. Click the down arrow to see details and options of the program
    - If there is more than one member in the client's household, be sure to toggle on every person to enroll them as well.
4. Click enroll



5. An Enroll Program screen will open.
    - *Project Start Date*: Today's Date
    - *Relationship to Head of Household*: Select the appropriate relationship
    - *Prior Living Situation*:
        - *Type of Residence:* Where the client slept last night.
        - *Length of Stay in Prior Living Situation:* "Previous place" = the location you selected directly above.
        - *Approximate date homelessness started:* When the client's most recent episode of literal homelessness began. This is often (not always) different than when the client's overall literal homelessness began.
        - *Number of times the client has been on the streets, etc. in the past three years:* "Times" = Episodes. It is important to note that looking back three years from the time you are speaking with client is as far back as you can look when completing this question.
        - *Total number of months homeless*: Now that you have the answer to the question above calculating the total number of months homeless should not be too difficult.
            - If more than 12 months homeless: If you selected "More than 12 months" in the previous question, select the total number of months homeless.
    - *Disabling Condition*: Select Yes/No
        - *Disability type:* Select Yes/No
        - *Long term:* Select Yes/No
    - *Zip Code of Last Address:* Where client last had permanent residence.
6. Select Save & Close / Save & Next
    - If there are other people in the client's household, you will be prompted to fill out an Enrollment screen for each household member. These additional Enrollment screens will auto populate.

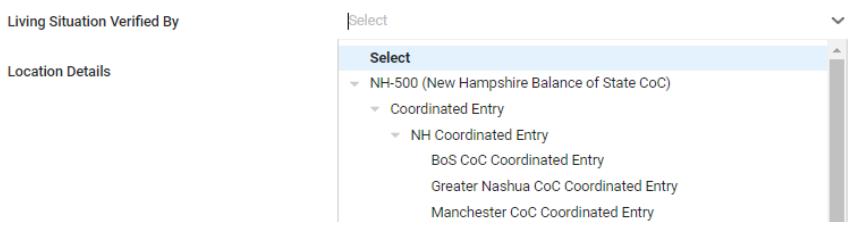
7. Complete all Enrollment screens that appear.
    - Save & Next until the last Enrollment screen populates.
    - Save & Exit when all of the enrollments are complete

ASSESSMENTS

CURRENT LIVING SITUATION

Upon enrollment into Coordinated Entry, every client should have a current living situation completed. The current living situation should be updated every time there is a change to the client's living situation.

1. Click the Start beside the Current Living Situation assessment.
    - Make sure all household members are toggled on.
2. Add Current Living Situation
    - *Date of Contact*: Today's date
    - *Current Living Situation*: Where client slept last night
    - *Living Situation Verified By*: The appropriate agency.
        - CE Staff Select: The CE program you are enrolling the client in



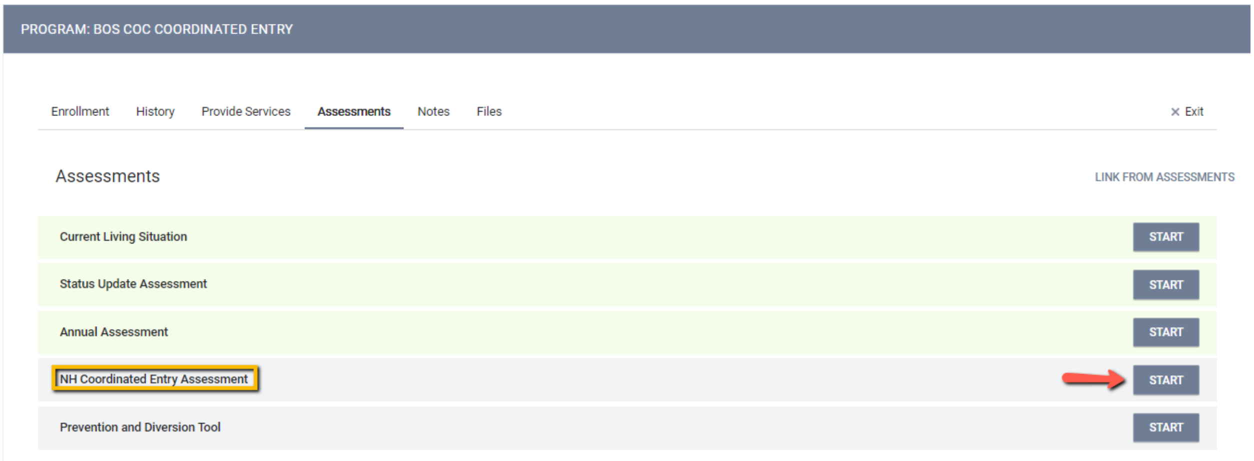
    - *Location Details text box*: If you have more information/details regarding the location of the client's Current Living Situation, you may enter them here. Otherwise, it can be left empty.
3. Save & Close

NH COORDINATED ENTRY ASSESSMENT

After completing the Current Living Situation for each member of the household, the head of household will need to have the NH Coordinated Entry Assessment completed.

The Coordinated Entry Assessment Tool primarily serves to assist in the prioritization of individuals, youth, and families for housing resources throughout the NH CE system, including: CoC-funded, ESG-funded, HOPWA-funded and State of New Hampshire Bureau of Housing Supports-funded programs.

1. Click Start beside the NH Coordinated Entry Assessment.



2. Complete the HUD required assessment questions:
    - *Assessment Date*: Date the assessment was completed.
    - *Assessment Organization*: The agency who did the assessment.
    - *Assessment Type*: The way in which the assessment was conducted.
    - *Assessment Level*: This will always be "Housing Needs Assessment" for the CE assessment.
3. Complete the remaining custom assessment questions
    - *Assessor Contact Information*: The information of the person conducting the assessment.
    - *Referred By:* The information of the person referring the client to CE if different from the assessor.
    - *Advocate Contact:* The contact information for the case manager or contact for housing matching.
    - *Interpretation required:* Toggle on if yes, leave if not needed.
    - *If so, Language:* This will populate if the interpretation question is toggled on. Type in the appropriate language.
4. Please indicate where you would like to are willing to receive services and housing.
    - *First Choice Location*: Select the client's first choice location
    - *Second Choice Location:* Select the client's second choice location
    - *Specific City/Town Needs*: This should be completed if there are additional considerations or barriers limited a client to a certain city/town.
5. Complete the assessment of Housing Barriers and Vulnerability.
    - *Current Living Situation*: Choose one of the drop down options
    - *Actively fleeing or attempting to flee DV:* Toggle on if this applies

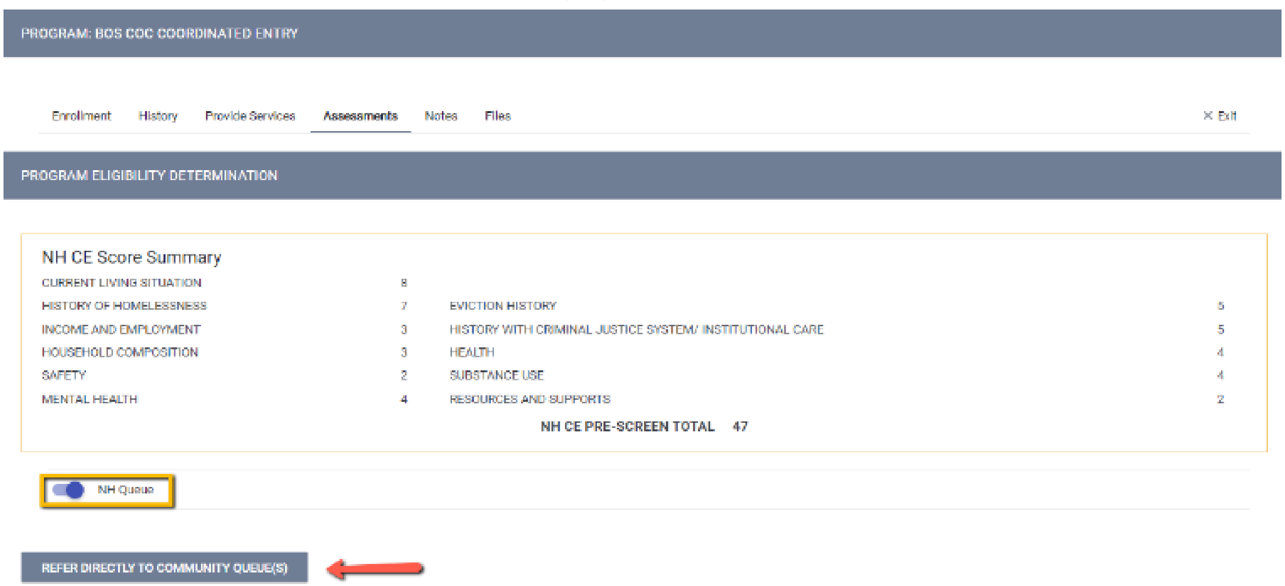
- Actively fleeing or attempting to flee Human Trafficking? (Definition: Exploitation of individuals through threat or use of force, coercion, abduction, fraud, and/or deception): Choose one of the drop down options.
- *History of Homelessness:* Choose one of the drop down options.
- *Became homeless again after receiving dedicated homeless housing assistance in the past:* Toggle on if this applies
- *Eviction History*: Choose one the drop down options.
- *Eviction on record in the last year*: Toggle on if this applies
- *Income and Employment*: Choose one of the drop down options.
- **History with Criminal Justice System/ Institutional Care:** Toggle on all that apply
- **Household Composition***:* Toggle on all that apply
- **Health:** Toggle on all that apply
- **Safety:** Toggle on all that apply
- **Substance Use***:* Toggle on all that apply.
- **Mental Health***:* Toggle on all that apply
- **Resources and Supports***:* Toggle on all that apply
- **Additional Notes***:* Add any notes that might assist in service planning.

6. Select Save

REFER TO THE NH QUEUE

Once the assessment is complete, the client will receive a score calculated based on the responses to determine client's acuity for prioritization.

- Clicking save on the assessment will bring you to a Program Eligibility Determination Page where the client's assessment score will display.



1. Toggle on NH Queue
2. Click refer directly to community queue
3. On the next screen, there is a section to add notes (optional).
4. Click **Refer Directly to Community Queue** to complete the referral to the Community Queue

***IMPORTANT: Every client needs BOTH enrollment and a referral to the appropriate queue to populate on the prioritization list**

PRIORITIZATION

Priority for housing programs will be based primarily on the following factors, which align with HUD's order of priority for housing resources:

As such the NH Coordinated Entry System has established the following order of priority for individuals, youth, and families:

1. Chronic Homelessness+ Highest Acuity + Length of Time Homeless
2. Highest Acuity + Longest Time Homeless (non CH) + Disability
3. Acuity Score + Homeless + Disability
4. Exiting Transitional Housing (Category 1 and 4 prior to TH entry) or persons fleeing or attempting to flee domestic violence+ Disability

In the event of "tie-breaking" among priorities, case conferencing will be utilized to determine the person(s) with:

1. Highest vulnerability score, CES will start with the highest acuity, score and work down in order of score.
2. Most severe service needs;
3. In a Place not meant for Human Habitation.

NOTE: Prioritization may be modified during public health crisis.

NEW HAMSHIRE PRIORITZATION REPORT

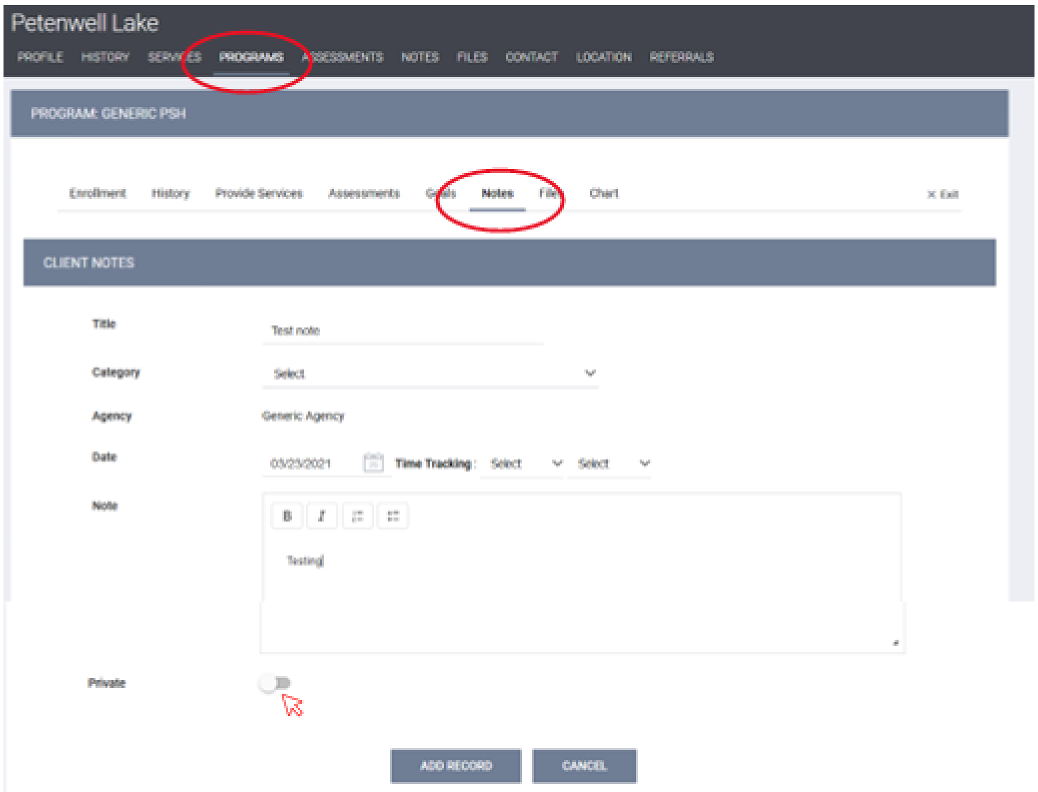
The New Hampshire Coordinated Entry Prioritization report lists clients in order using the order of prioritization listed above. A user must have access to Looker to run this report. This report can be run for each CoC and is broken down into sections.

- Preliminary Prioritization List- All assessed and enrolled clients in prioritized order
- Family Prioritization List- All assessed and enrolled households with children
- Individual Prioritization List- All assessed and enrolled single adults
- Veterans Household Prioritization List- All assessed and enrolled households with a veteran Head of Household
- Youth 24 and Under Prioritization List- All assessed and enrolled households with a head of household 24 and under

NOTE: Please see the NH Coordinated Entry Prioritization Looker report guide for instructions on how to run this report.

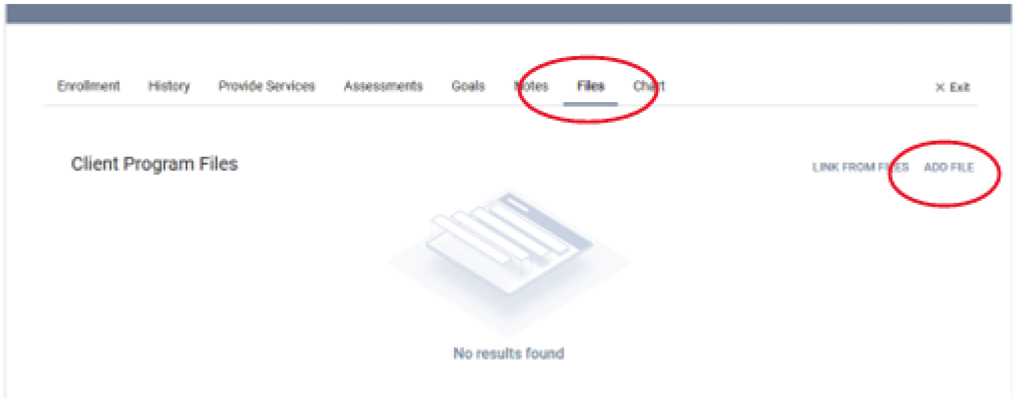
CLIENT CASE NOTES

Most client Notes are associated with a specific program and are entered within the program enrollment.

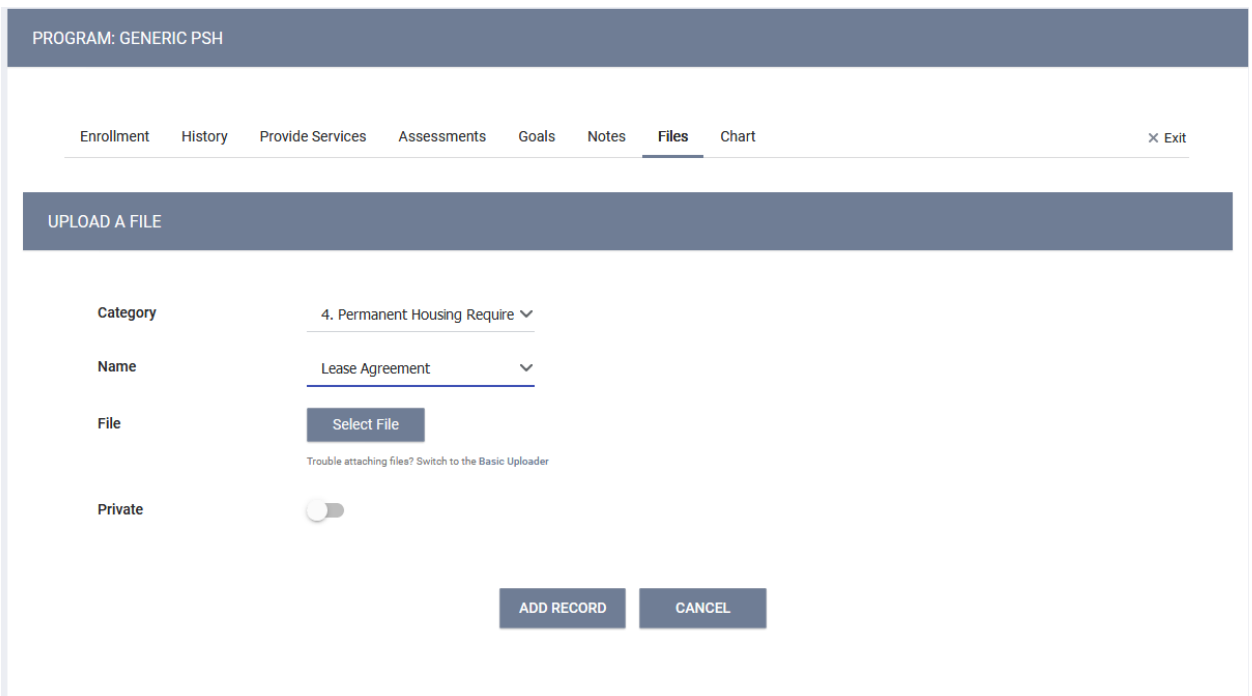


- Selecting Private makes it so only users from your Agency can see that a Note exists.
- Users outside of your agency can view all details of a Note created under an enrolment but cannot make any edits.

ATTACHING A FILE

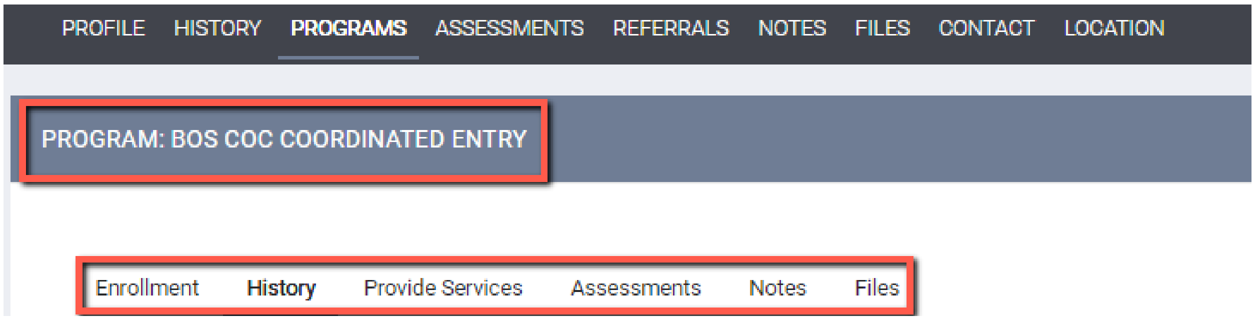


- Relevant program documentation can be attached under the Files tab.
- Clicking Add File opens a window where the Category and Name are chosen from a picklist. Clicking Select allows you to upload a file from your computer.

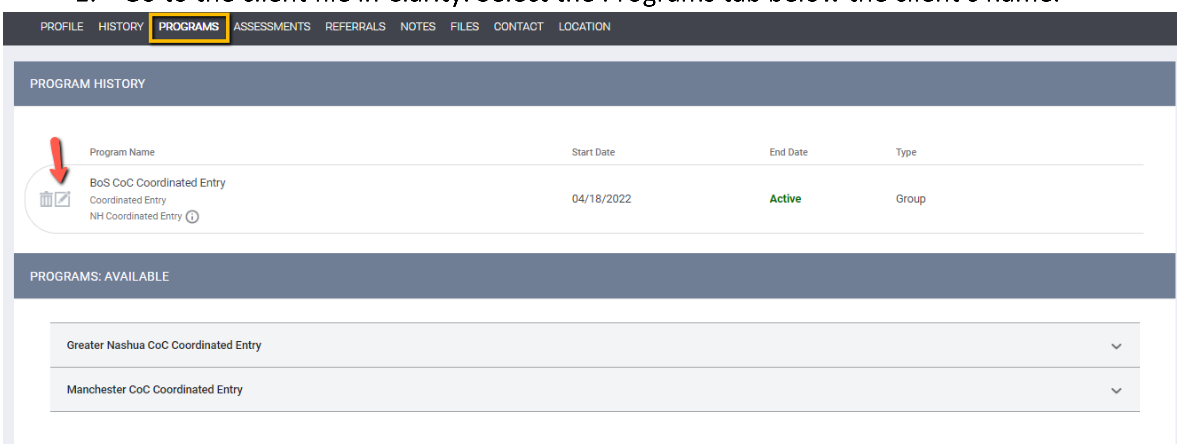


- Selecting Private makes it so only users from your Agency can see that a File has been uploaded.
- Users outside of your agency can view all files but cannot make edits.

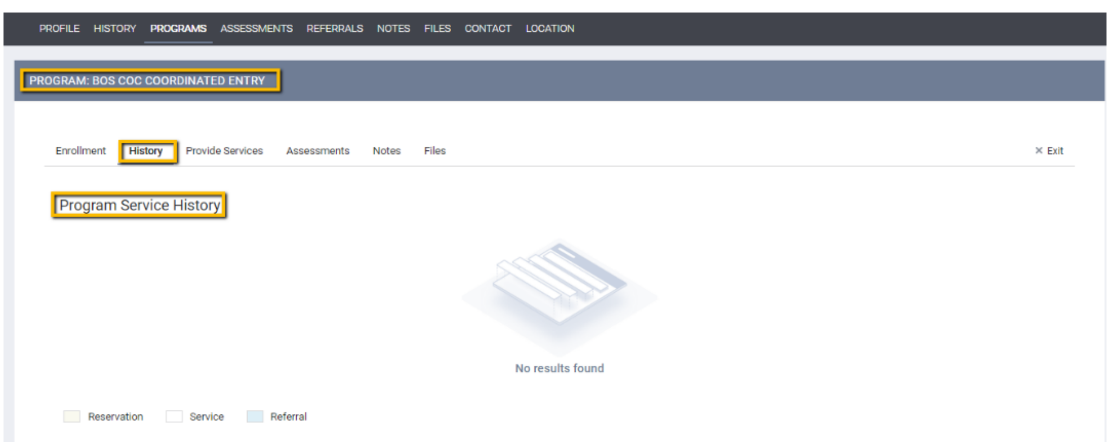
IMPORTANT: *From this point on, when doing any work with the client related to their Enrollment in the appropriate Coordinated Entry program, check to make sure that you are working within the client's Program Enrollment. Please see directions and images directly below.*



1. Go to the client file in Clarity. Select the Programs tab below the client's name.



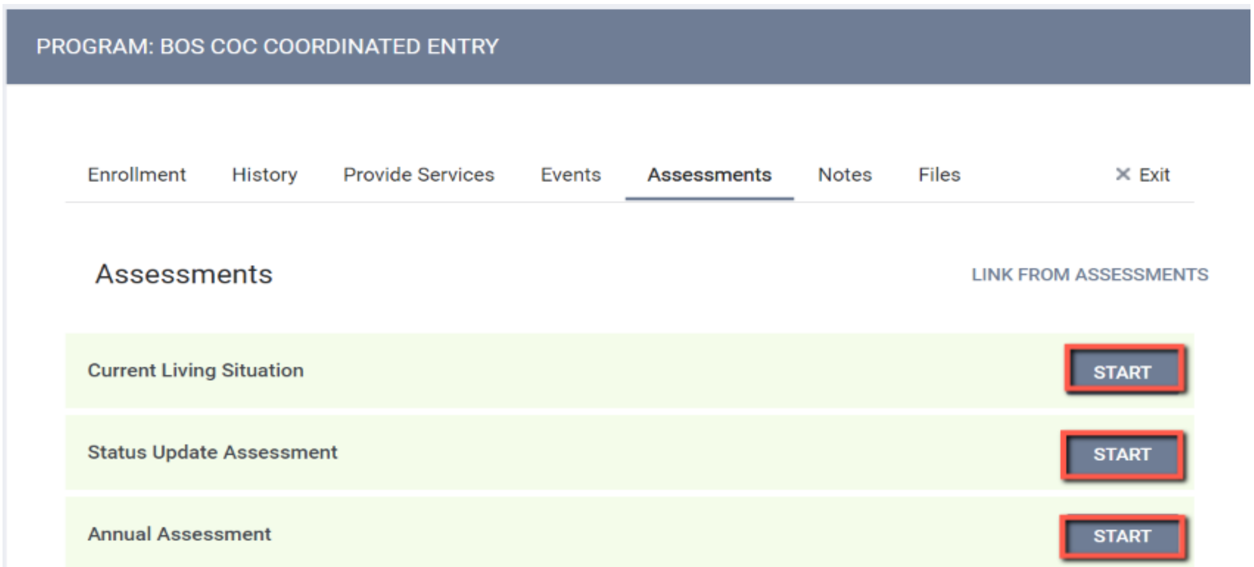
2. Select the edit icon beside the CE program name.
3. A Program Service History screen will appear. This is the History tab screen within the program any data you enter will be entered under the CE Program.



COORDINATED ENTRY UPDATE

Now that the client is enrolled in the CE Program, any subsequent interactions, including referral follow-ups, phone conversations, meetings, etc., will all be documented within the CE Program. This is done by completing the following three Assessments:

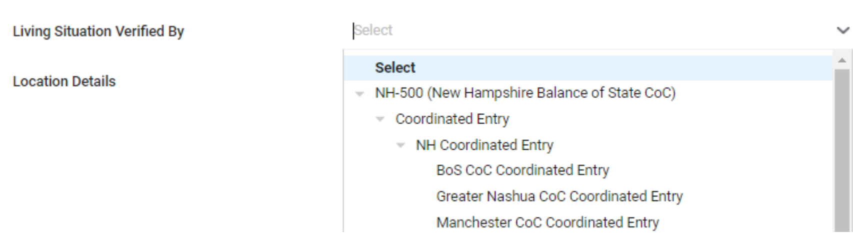
- Current Living Situation Assessment
- Status Update Assessment
- Annual Assessment



Please Note: Don't forget to check the client contact information!

CURRENT LIVING SITUATION

1. Click the Start beside the Current Living Situation assessment.
   - Make sure all household members are toggled on.
2. Add Current Living Situation
   - *Date of Contact*: Today's date
   - *Current Living Situation*: Where client slept last night
   - *Living Situation Verified By*: The appropriate agency.
     - CE Staff Select: The CE program you are enrolling the client in



   - *Location Details text box*: If you have more information/details regarding the location of the client's Current Living Situation, you may enter them here. Otherwise, it can be left empty.
3. Save & Close

STATUS UPDATE

1. Click start beside the Status Update Assessment.
   - Include all household members when prompted.
2. Click Add Status Assessment
   a. *Project Start Date:* Today's date
   b. *Disabling Condition*: Select Yes/No
   c. *Living Situation at Time of Update*: Answer all five questions. See instructions under *Coordinated Entry Program Enrollment* for additional information on how to answer these questions.
3. Save & Close

ANNUAL ASSESMENT

1. Click start beside the Annual assessment.
   - Include all household members when prompted.
2. Click Add Status Assessment
   - *Project Start Date*: Today's date
   - *Disabling Condition*: Select Yes/No
   - *Living Situation at Time of Update*: Answer all five questions. See instructions under Coordinated Entry Program Enrollment for additional information on how to answer these questions.
3. Save & Close

COORDINATED ENTRY EXIT

- A client / household is removed from the Priority List when:
  - They are no longer in need of housing assistance / self-resolved, or
  - The referring agency makes 3 unsuccessful attempts to contact the client / household within 90 days.
  - The client enrolls in a PSH or RRH program.

- A client / household is exited from the Coordinated Entry Enrollment;
  - They are no longer in need of housing assistance / self-resolved, or
  - The referring agency makes 3 unsuccessful attempts to contact the client / household within 90 days, or
  - The client / household has become permanently housed

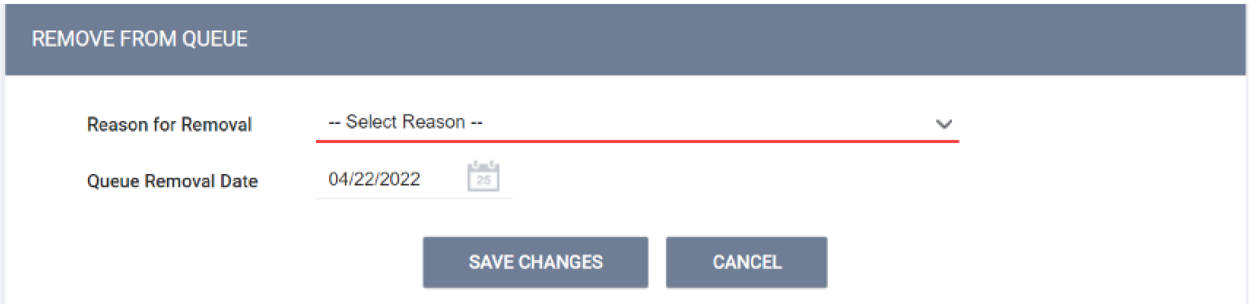
- There are two steps to removing a client from the Coordinated Entry Priority List & Program:
  - Remove the client's referral from the Community Queue
  - Exit the client / household from the Coordinated Entry Program Enrollment

REMOVING CLIENT FROM THE QUEUE

1. Search the client's name and find the referral in the history tab.
2. Scroll to the Remove from Queue section and choose a reason

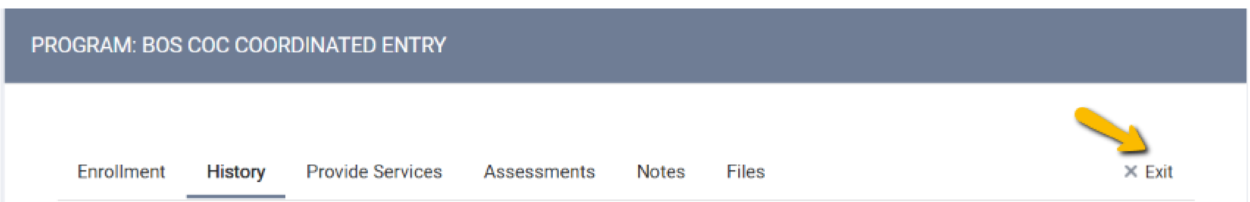
- Certain reasons will populate an additional question, ensure those are completed as well.
- Select the date client was removed.

3. Click Save Changes

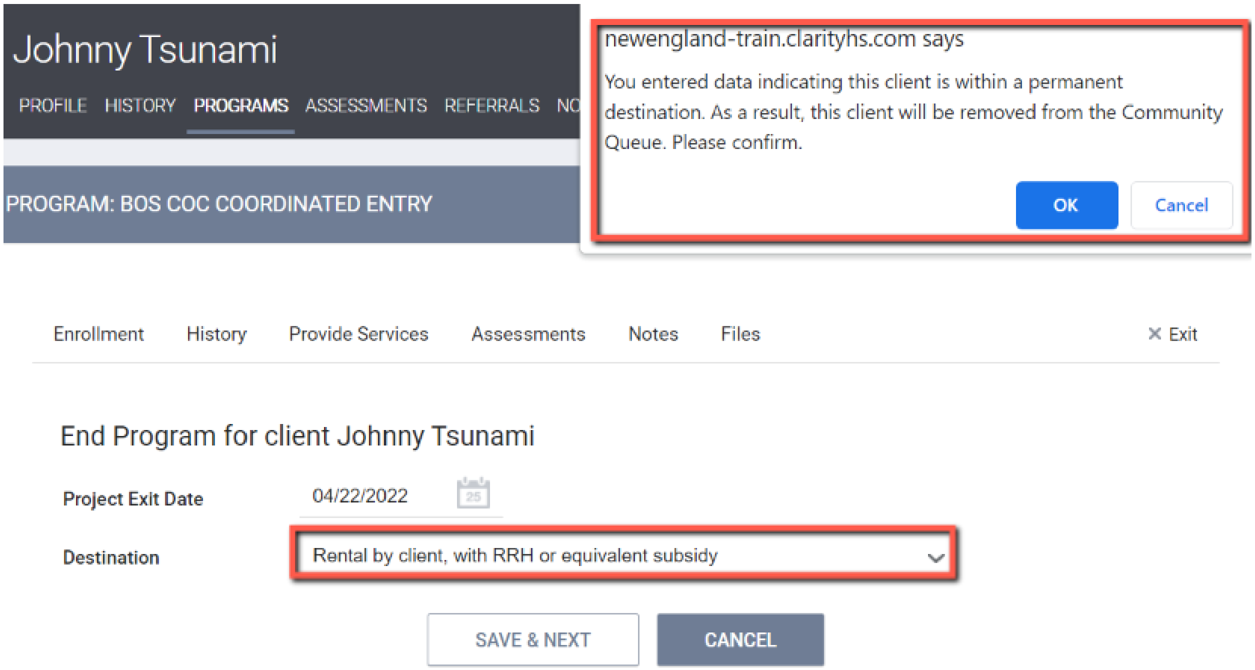


EXITING CLIENT FROM CE PROGRAM

1. While in the Head of Household's profile, select the programs tab and edit the CE program enrollment.
2. Click Exit
    - Be sure to toggle on any additional household members so they are exited as well.



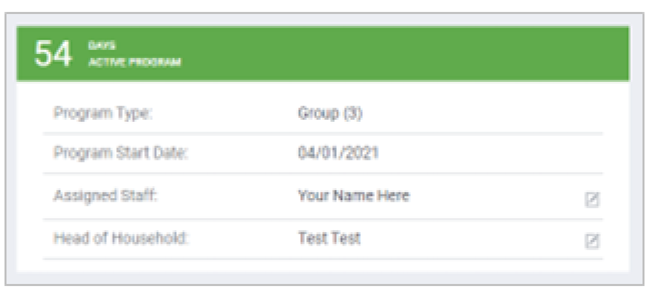
3. An End Program screen will open.
    - *Project Exit Date*: Today's Date
    - *Destination:* Where the client is living
        - If a permanent housing destination is chosen, an additional box will populate to confirm that the client will now be removed from the CQ.



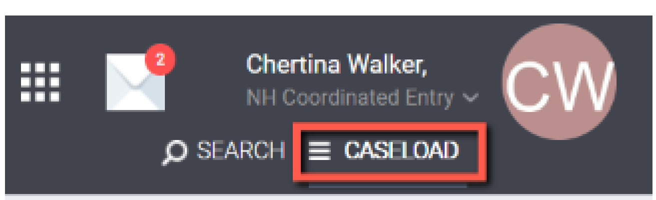
4. **Save & Close / Save & Next**
    a. If there are other people in the client's household who are also exiting the program, you will be prompted to fill out an End Program screen for each household member. These additional End Program screens will auto populate.
5. Complete all End Program screens that appear. Click Save & Next until the last End Program screen populates.
6. Save & Close

CASELOAD

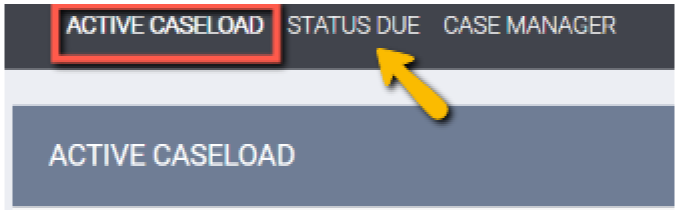
- When you create an enrollment into your Coordinated Entry program, you are automatically listed as the **Assigned Staff** in the Enrollment dashboard.



- The client / household is automatically added to your Caseload tab when you are listed as the Assigned Staff.



- When you click on the **Caseload** tab, you land on the **Active Caseload** tab. This will show you all the active enrollments for which you are listed as the **Assigned Staff**. This provides an easy way to track your active Coordinated Entry enrollments and referrals.

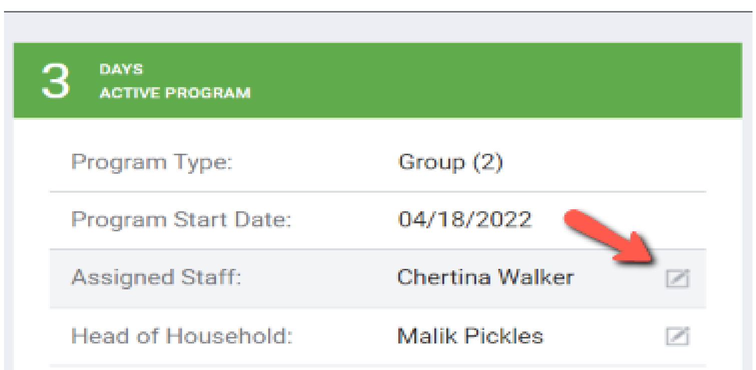


- The **Status Due** tab will provide information on households' enrollment start dates and the last date on which a status update was completed.
  - This tab can assist in tracking when clients are due for a any updates to their Coordinated Entry Referral and Enrollment.

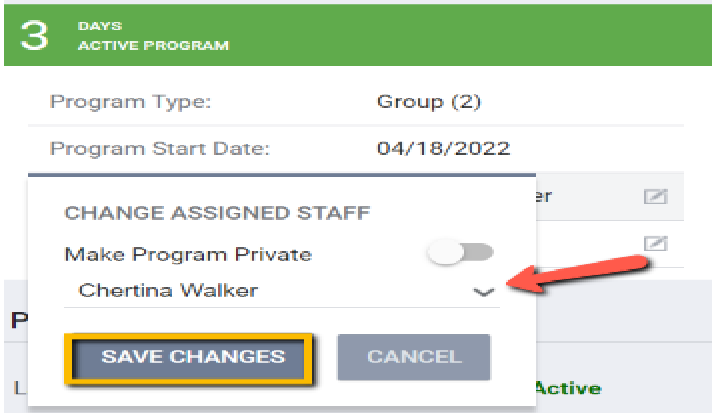
REASSIGN CLIENT TO ANOTHER CASELOAD

- There are times where the staff member that enters the enrollment and referral into Clarity is not the staff member that is responsible for completing follow ups and managing the referral.
- In these situations, the **Assigned Staff** in the program enrollment can be updated so the client / household shows up on the appropriate staff member's **Caseload** tab.

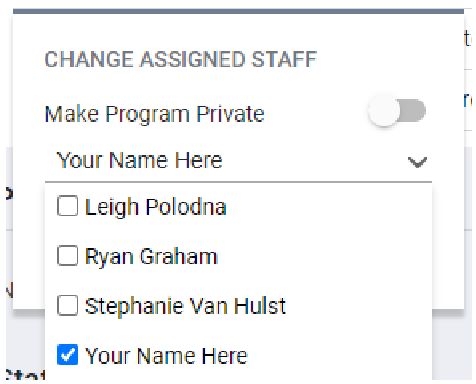
1. Switch into the Coordinated Entry agency after logging into Clarity
2. Go to the Head of Household's file and click on the **Programs** tab.
3. Click to edit the appropriate Coordinated Entry Program Enrollment.
4. On the right side of the screen is the **Enrollment Dashboard**. Click to edit the **Assigned Staff**.



5. Click on the dropdown. You will see the current **Assigned Staff member** with a checkmark to the left of their name, and you will see your name appear at the bottom of the list.



6. Uncheck the original **Assigned Staff** member and check the box next to your name.
7. Save Changes



- The client / household's enrollment into your Coordinated Entry Program will now show up on your **Caseload** tab, and will be removed from the original staff member's **Caseload** tab.

CONTACT

If you have any questions, please reach out to your HMIS System Administrator.

- NH HelpDesk: NHHMIS@icalliances.org

REVISION HISTORY

Date	Version	Document Change
04.2022	1.0	Initial Draft
05.2023	1.1	Removing referral process Updating exits from coordinated entry program
06.2023	1.2	Updates to questions and process