



# **Racine CoC New CE Assessment in HMIS**

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Transition Plan  
December 2023

# Training Outline

## Today's training will cover:

- How to add a new Household to the Homeless Priority Lists using the new Homeless Assessment
- How to re-assess clients with an existing referral to the Homeless Priority Lists using the new Homeless Assessment

## It will not cover:

- How to complete follow ups in HMIS
- How to remove clients from the priority list due to no contact
- How to accept referrals when a client prioritizes for programming

# Adding Households to the Homeless Priority List

	BEFORE	NOW
<b>Step 1: Create the Coordinated Entry Program Enrollment</b>	<ul style="list-style-type: none"> <li>• <b>HH with Children</b> - all household members enrolled together in one group enrollment</li> <li>• <b>HH without Children</b> - each household member is enrolled and assessed individually</li> </ul>	<ul style="list-style-type: none"> <li>• All household members can be enrolled together in one group enrollment, regardless of household composition               <ul style="list-style-type: none"> <li>◦ <b>Note</b> - adults in households without children may still be enrolled and assessed individually if they so choose</li> </ul> </li> </ul>
<b>Step 2: Add the Appropriate Assessment</b>	<p>Select the <b>1 of 3</b> assessments to complete based on the household composition and age of client(s) being assessed:</p> <ul style="list-style-type: none"> <li>• VI-SPDAT for Singles</li> <li>• VI-Y-SPDAT for Transition Age Youth</li> <li>• VI-F-SPDAT for Families</li> </ul>	<p>There is <b>only 1</b> assessment used for all households, regardless of composition and age of client(s) being assessed.</p> <ul style="list-style-type: none"> <li>• Racine Housing Support Assessment</li> </ul>
<b>Step 3: Make the Referral to the Racine Perm Housing Queue</b>	<p>The referral date was automatically set to the date you entered the referral into HMIS (and could not be back-dated if you were completing back data entry)</p>	<p>The referral date can now be adjusted to match the date the client was actually assessed</p> <ul style="list-style-type: none"> <li>• <b>Note</b> - referrals need to be entered into HMIS within 5 days of completing the assessment</li> </ul>

# Reassessing Clients with an Existing CE Referral

**Step 1:** Remove the client's current referral from the Racine Perm Housing Queue

- Note the date the client was originally referred to the Racine Perm Housing Queue

**Step 2:** Complete the Racine Housing Support Assessment within the Head of Household's existing Coordinated Entry enrollment

**Step 3:** Upon completion of the Racine Housing Support Assessment, refer the client back to the Perm Housing Queue

- Make sure to adjust the Referral Date to match the original date the client was referred to the Queue using the VI-SPDAT, VI-Y-SPDAT, or VI-F-SPDAT

**Step 4:** In the CE enrollment, add a Status Update, and Note to document any updates to the client's case.

# Reassessing Clients with an Existing CE Referral

## Step 1: Remove the client's current referral from the Perm Housing Queue

- Click on the "History" tab in the client record and locate the pending referral to the Perm Housing Queue
- Select *Reassessed* as the "Reason for Removal", and *For Homeless Priority List* in the secondary dropdown.

*Make note of the client's original referral start date, as you will need this information when adding them back to the Racine Perm Housing Queue.*

The screenshot shows the 'Racine City & County CoC Coordinated Entry System' interface. At the top is a dark blue header with the system name in white. Below this is a light gray bar containing the text 'SEARCH FOR A CLIENT' on the left and 'ADD CLIENT (+)' on the right. The main content area has a white background. It features a search input field with a magnifying glass icon and the letter 'S'. Below the input field is a small gray box with the text 'Use full name, partial name, date of birth or any combination.' To the right of the input field is a dark blue 'SEARCH' button. Below the search area is a gray banner with a warning icon and the text 'This is the TRAINING SITE! Do NOT enter real client data!'. At the bottom left of the interface, there is small text that reads 'Managed with Clarity Human Services'.

# Reassessing Clients with an Existing CE Referral

## Step 2: Complete the *Racine Housing Support Assessment* with the Head of Household

- From the “Programs” tab, click to edit the client’s existing Coordinated Entry enrollment.
- Navigate to the “Assessments” tab within the enrollment, and click “Start” to begin administering the Racine Housing Support Assessment.

The screenshot shows the 'Santa Claus' client profile page with the 'PROGRAMS' tab selected. The page displays a 'PROGRAM HISTORY' table with one entry: 'Racine CoC Coordinated Entry System' (Coordinated Entry) starting on 12/06/2022, marked as 'Active', and of type 'Individual'. Below this, the 'PROGRAMS: AVAILABLE' section shows a dropdown menu with 'Racine CoC DHS Housing Supportive Services' selected. The footer indicates the system is 'Managed with Clarity Human Services' and provides the URL: <https://dashgreatlakes-train.clarityhs.com/clients/277948/program>.

Program Name	Start Date	End Date	Type
Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System ⓘ	12/06/2022	Active	Individual

PROGRAMS: AVAILABLE

Racine CoC DHS Housing Supportive Services

Managed with Clarity Human Services

<https://dashgreatlakes-train.clarityhs.com/clients/277948/program>

# Reassessing Clients with an Existing CE Referral

## Step 3: Refer Household Back to the Perm Housing Queue

- When completing the Racine Housing Support Assessment, make sure:
  - The Assessment Date matches the date you reassessed the client
  - The “Living Situation at Time of Assessment” reflects where the client is staying at the time you reassess.
- After completing the Racine Housing Support Assessment, click “Save”.
- On the Program Eligibility Determination screen, click “Refer Directly to Community Queue(s)”.
- On the following Referral Screen, ***change the Referral Date so it matches the client’s original referral date.*** Then click “Send Referral”.

The screenshot shows the 'Santa Claus' system interface. At the top is a dark blue header with the title 'Santa Claus' and a navigation menu: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this is a light blue bar indicating the current program: 'PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM'. A secondary navigation bar contains links for Enrollment, History, Provide Services, Events, Assessments (which is highlighted), Notes, Files, Forms, and an Exit button. The main content area is titled 'RACINE HOUSING SUPPORT ASSESSMENT'. It contains several form fields: 'Assessment Date' with the value '12/06/2023' and a calendar icon; 'Assessment Location' with the value 'Case manager office'; 'Assessment Type' with a dropdown menu currently showing 'Select'; 'Assessment Level' with a dropdown menu showing 'Select', 'Phone', 'Virtual', and 'In person' (which is highlighted); a section header 'HOMELESS ASSESSMENT'; 'Living Situation at Time of Assessment' with the value 'Place not meant for habitation (e.g., a vehicle, an abandoned building, bl'; 'Survivor of Domestic Violence' with the value 'No'; a question about disabling conditions with a 'Select' dropdown; another question about non-chronic medical needs with a 'Select' dropdown; and a partially visible question 'Are there any children under the age of four in'.



# Reassessing Clients with an Existing CE Referral

## Step 4: Add a Status Update Assessment, Current Living Situation Assessment, and Note

- Navigate back to the Head of Household’s Coordinated Entry enrollment and add a Status Update, and Note to reflect their current situation.

Santa Claus

PROFILEHISTORYSERVICESPROGRAMSASSESSMENTSNOTESFILESCONTACTLOCATIONREFERRALS

HISTORY

Advanced search optionsView

Service Name	Start Date	End Date	
Racine Housing Support Assessment Racine City & County CoC Coordinated Entry System		12/06/2023	
Referral: Racine Perm Housing Queue Racine City & County CoC Coordinated Entry System referral to Community Queue	12/06/2022	Pending	
Referral: Racine Perm Housing Queue Racine City & County CoC Coordinated Entry System referral to Community Queue	12/06/2022	12/06/2023	
Consent to Participate in Coordinated Entry Racine City & County CoC Coordinated Entry System		12/06/2022	
Racine WI COVID Response and VI-SPDAT Prescreen for Single Adults [V2] Racine City & County CoC Coordinated Entry System		12/06/2022	
Racine CoC Coordinated Entry System Racine City & County CoC Coordinated Entry System	12/06/2022	Active	

Program

Service

Referral

Reservation

Assessment

Events

Managed with Clarity Human Services

Recover deleted data



# Transition Plan

- On the morning of Wednesday, December 13th - run both Homeless Priority List reports (HH with Children and HH without Children) in HMIS. These lists will be used to fill program openings during the transition.
- As of December 13th, the new Racine Housing Support Assessment will be available for use in the Clarity Live Site, and the VI-SPDAT, VI-Y-SPDAT, and VI-F-SPDAT will no longer be accessible.
- The new priority list reports are anticipated to be released on Monday, December 18th.

# Thank You!

**Please reach out to your HMIS System Administrator with any questions. We are always happy to help!**

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