

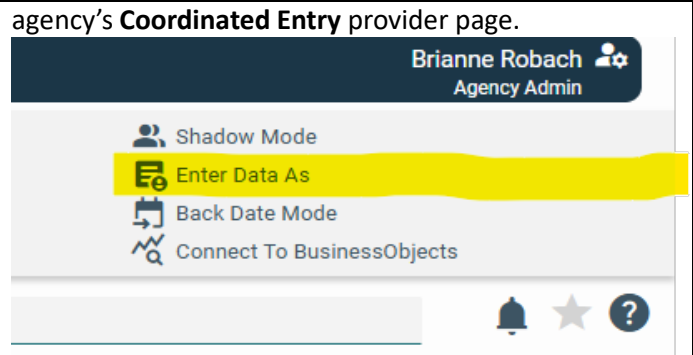
Coordinated Entry Assessment Workflow

This workflow and script is intended to be completed by CE assessment agencies with participants who are **Categories 1 & 4 only**. Clients who are category 2 may follow the workflow through CHC assessment to see if prevention resources are available, but no HMIS entry should be completed.

The script and potential follow-up columns are optional and are intended to be used as reference by agency staff completing CE assessments.

Steps	Script	Potential Follow-Up	CHC form/HMIS Guide
Introduction	"Hi, my name is XXX and I am [POSITION] with [AGENCY]. We work with individuals who are living outside or in shelter and help people ... [SUMMARIZE SERVICES YOUR AGENCY PROVIDES]. For agencies engaging with participants over the phone: "Tell me a little more about what's going on and what led you to calling today." "Are you working with anyone on a housing plan?"	If yes – "Awesome, who are you working with? When are you scheduled to meet with them next?" Assist with scheduling if needed, and any additional needs. If no – "Have you completed a recent housing assessment?"	If you have HMIS access, verify whether the participant has CE entry/exit within the last 90 days. If yes, encourage them to continue working on their housing plan and assist with any immediate needs. If no, ask about completing a housing assessment.

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		Q: "What is a housing assessment?" A: "A housing assessment is the first step to getting any kind of housing assistance through Coordinated Entry. Completing a housing assessment doesn't guarantee a resource, but it is the first step to getting help and we can go from there." "Would you like to complete an assessment today?"	
Complete Community Housing Connect assessment	"The first part of this assessment is to understand your housing situation through a 20 question survey, it only takes a few minutes that can be completed on communityhousingconnect.org. We can complete that today and if you don't understand a question, let me know and I'll be happy to clarify."		Staff can choose to: - direct participants to a digital device and CommunityHousingConnect.org to complete the assessment - assist participants with accessing a digital device and walking through the CHC questions, including reading question and/or selecting answers on behalf of the participant, if that level of support is appropriate
Enter Data As			Before starting any data entry, it is critical to ensure what you are in the correct EDA. In the upper right corner of HMIS, select Enter Data As and select your

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			agency's Coordinated Entry provider page. 
Release of Information tab: Add a Release of Information	“As we talk today, I will be asking you a few questions for our record keeping portal which is called the Michigan Homeless Management Information System. The database is used by our agency to store client information for everyone we speak with. Once the information you share today is added to the database, it can be accessed by the agencies listed on this agreement to make access to housing programs easier so you don't have to share your information every single time. The Release of Information and Privacy Statement for this database can be found on our website at [share link to your agency's	If no – “No problem. We would like to share with you that this could slow down the referral process if there is an available resource for you. Also, you may have to repeat your information to the housing provider if a referral is made.” If they are missing the external sharing group: “At some point in the past you had selected to restrict visibility of your client record from other housing providers in the community. Would you like to update your visibility so that other providers can access your information? This will assist with coordinating services to resolve your housing crisis.”	Navigate to the ROI tab. If the client consents to having their information shared, add the applicable ROI: - 30 day ROI if a verbal ROI is given - 5 year ROI if a signed ROI is completed and uploaded to HMIS *If you see that a client record is closed with exceptions (has a red lock) and the participant consents to sharing information with all providers, please email signed ROI to the HMIS Sys Admin who will adjust visibility settings appropriately.

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	website]. Your information will not be shared outside of our partner agencies. This information will be kept for five years. Are you okay with this information being shared with our partner agencies so that we can better coordinate resources for you?"		
Intro to HMIS CE Assessment Questions	"I will ask you the questions and record your response. You can refuse any question; if you do not answer a question, you will not be denied services. Your answers help determine what type of assistance would be best for you moving forward. Are you ready to begin?"	See FAQ section for common questions.	
Find Client in HMIS and Review Demographics in Client Profile	"Can I get your first and last name please?" (Confirm spelling) "What is your date of birth?" (Confirm date) "What is your social security number?" (Confirm number)		Find Client in HMIS. If the client record does not already exist, create a new client profile being sure to complete all the basic client profile data elements and making sure all UDEs are filled out in each HMIS profile. Note: the head of household must be 18 or older to complete a CE assessment and entry. Last four of SSN are sufficient if client prefers

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	“Which racial or ethnic groups do you identify with?” “Have you ever served in the military?”		
Households tab: Confirm household configuration and update if needed	“Are there other members of your household that would be housed with you, if you were to receive a resource?”	If other household members need to be added to the household tab: For adults, <u>speak directly with each adult</u> and go through each question in Demographics. If they indicate children are part of the household and the children are not physically present at the time of assessment - “Could your children stay with you this week if you were to receive a permanent housing resource?”	Navigate to the households table and ensure all information matches the household that plans to be housed together if they were to receive a housing resource, even if they are currently staying apart due to the experience of homelessness. If needed, add all other household members to the household. First search for a client and, if needed, create a new HMIS profile for additional household members ensuring all Demographics information is completed. Ensure there is exactly one client with Head of Household as Yes and Relationship to Head of Household as Self. Note: For adult members of the household, they must be present to report UDEs and allow an ROI. Note: participants identifying themselves as parents of a minor child should have at least partial custody of children or be in the process of reunification to have children listed as part of the household.
Entry/Exit: Navigate to the Entry/Exit tab and add a CE entry/exit.			Click and Add Entry/Exit *The entire HH should be added to the Entry. Select the box next to the correct household to ensure all household members are added.

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			Household Members To include Household members for this Entry / Exit, click the box beside each name. Household may be selected. ☒ (67) Two Parent Family ☐ (202) Addams, Wednesday ☒ (203) Addams, Gomez ☒ (204) Addams, Morticia ☒ (205) Addams, Pugsley Project Start Data - (202) Addams, Wednesday - Type: HUD - Project Start Date: today's date - County: Kent Type * HUD Project Start Date * 11 / 11 / 2024 County Kent, MI Select County/Parish Clear Save & Continue Cancel - Select Save & Continue - Ensure Entry Assessment is <u>Kent/GR CE Assessment 2024</u> Entry Assessment Select an Assessment Kent/GR CE Crisis Needs Assessment 2020 Kent/GR CE Assessment 2024 Kent/GR CE HAP Assessment 2020 Kent/GR CE HAP Ret... Household Members Kent/GR CE Assessment 2024 Entry Date
Basic Demographic Information	Review any demographic information that you did not confirm in the above steps.		Enrollment CoC: MI-506 (Kent) Relationship to Head of Household: MUST be completed for each person. Ensure there is exactly one client with Relationship to Head of Household as Self .
Disabling Condition	"I am going to ask some questions about any conditions that affect your ability to live independently.		Complete Does the client have a disabling condition? for all members of the household based on the participant's response.

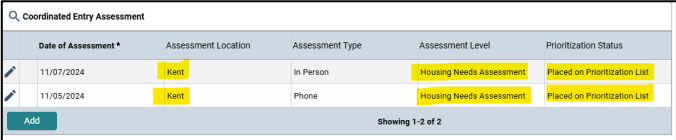
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	For this question, a disabling condition is a long-term physical, mental, or emotional impairment (like a chronic health issue, mental health disorder, developmental disability, or substance use disorder) that makes it hard to live independently.” “Do you have any disabling conditions”	If yes – “Do you currently receive income your disability?” If client doesn’t know – “That’s okay, sometimes people aren’t sure.” Client prefers not to answer – “I understand; we respect your privacy.”	Verification of Disability/SSI or SSDI Documentation: Select yes if the participant reports that they receive SSDI/SSI for their disability. Note: this references social security income for disability, NOT social security income for retirement. If participant is older than 62, only indicate yes if they receive social security income for their disability.
Complete remaining information for Head of Household and all adults			
Zip Code	“Can you tell me the zip code of the last place you were living where you felt safe and called home, or the last place you lived and received mail at?”		Add zip code to Zip Code of Last Permanent Address for HoH and all adults.
Entry/Exit: Homeless History Interview	“Next, I’m going to ask a few questions about your housing situation over the last few years. These questions help us understand what kind of support might be the best fit. It is important that I collect		Homeless History Interview questions are used to determine whether someone is chronically homeless. It is very important to ensure that the information here accurately reflects a person’s experience of time in shelter and unsheltered in the last 3 years. Questions should be answered for HoH and all adults.

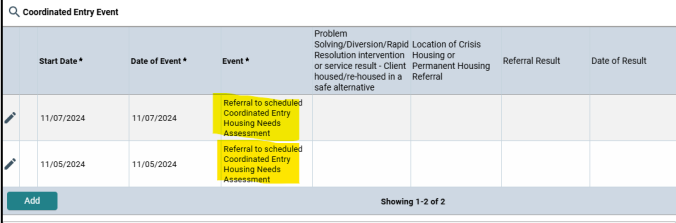
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	detailed information here as it helps us determine whether you may be eligible for specific types of housing resources.” “Where did you stay last night?” “And how long have you been staying there?” Approx. start date: “Can you tell me when this period of staying outside and/or in shelter started?”	Built-in conditional logic may activate the questions about how long they stayed (answer automatically populates) and where they stayed immediately before that situation: “On the night before you were staying at [situation], where did you stay?” If they are not sure of an exact date: “Do you know what month it was when you began staying outside or in shelter?” If they are not sure of the month, reference previous major holidays	Prior Living Situation: Complete this to indicate where the person stayed the night <u>immediately prior</u> to completing the entry. This will very likely be in shelter or in a place not meant for human habitation. If it is not, complete a problem-solving conversation to try to divert household from experiencing homelessness. *Only complete an entry after it has been determined that this person has no other place to stay the upcoming night and plans to stay in shelter or in a place not meant for human habitation. Length of Stay in Previous Place: Select the amount of time the client was staying in the situation they were in last night. Did you stay less than 90/7 days? (answer automatically populates) On the night before, did you stay on the streets, in emergency shelter, or a safe haven?: Indicate yes if the participant stayed in an emergency shelter or outside immediately before their prior living situation If it populates, complete Approximate date this episode of homelessness started: Record the actual or approximate date of the beginning of the continuous period of homelessness (on the streets, in emergency shelters, or moving back and forth between those places). This does not include any period of 7 or more

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	“Over the last three years, including this time, can you tell me how many different times you’ve stayed outside, in shelters, or a combination of those two places? This is not counting any times that you may have stayed with family or friends, couch surfed or stayed in a motel or hotel.” “For example, if you had a period where you stayed between shelter and outside, then you stayed with family or friends or in a motel for at least 7 days, and then stayed in shelter or outside again, that would count as two times.” “From the last three years, can you tell me how many months you’ve stayed outside or in shelters? If you were outside or in shelter for one	or seasons. Example: “Do you know if you were staying outside or in shelter around [insert recent holiday or season like Thanksgiving, Christmas, 4th of July, spring, fall, your last birthday, etc.]?” If they are unsure how many times and/or how many months they have experienced category 1 homelessness over the last 3 years, walk back through their previous housing situations – “And where did you stay before that?” “How long did you stay there?”, etc. to determine the number of months and episodes over the last 3 years. If the information indicates the participant may be experiencing chronic homelessness, encourage them to think about who can	days when the participant was couch surfing, paying to stay in a motel, or otherwise not category 1. If it populates, complete 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. Record the number of times the participant has stayed on the streets, in emergency shelters, or moving back and forth between those places. This does not include any period of 7 or more days when the participant was couch surfing, paying to stay in a motel, or otherwise not category 1. If it populates, complete Total number of months homeless on the streets or in emergency shelter in the past three years. Record cumulative number of months on the streets, in emergency shelters, or moving back and forth between those places. This does not include

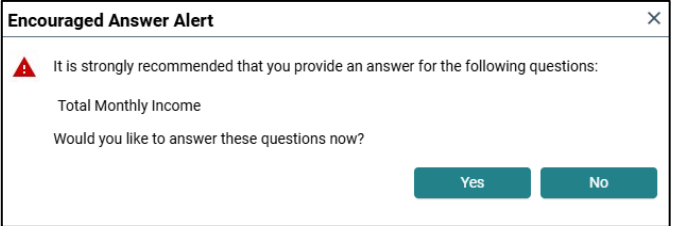
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	day in a month, that month counts.”	document their unsheltered homelessness as documentation is likely needed if they are referred to PSH. “Can you think of anyone who witnessed where you were staying while you were staying outside? If you were to receive a referral to a housing resource, a requirement is that you have a third party verify your experience of homelessness over the last few years. Having an idea of who you could ask for documentation can help that process move quickly.”	any period of 7 or more days when the participant was unstably housed. If the person was in shelter or outside for one day in a month, that month counts. Resources: - Approx. Start Date (3.917) Helper – a flowchart designed to help CE assessors determine approx. start date - LOT Homeless Tracking Table – a table designed for CE assessors to add information on previous living situations to help determine # of months and episodes of homelessness If desired, you can list information of who may be able to verify unsheltered homelessness in the HMIS Client Notes.
Entry/Exit: Housing Status & Observation of Current Homelessness			Complete Housing Status & Observation of Current Homelessness questions for HoH and all adults. *Housing Status: Should always be Category 1 or Category 4 for CE entries. If it is not, STOP and delete the entry. If appropriate, complete a problem-solving conversation to try to divert the household from experiencing homelessness. (HUD Categories of Homelessness chart) Observation of Current Homelessness: Select Yes if you visibly observed this person staying in shelter or their car/encampment/outdoor location
Entry/Exit: Income	“Do you have any income from a job?” “Do you receive any other income, like social security or disability benefits,		Complete Income from Any Source for HoH and all adults.

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	child support or alimony, or gifts or contributions from family?"		Complete % of Median Income for HoH and all adults using the current AMI table (CE Resources Folder)
Entry/Exit: Survivor of Domestic Violence	"Next I am going to ask you questions about domestic violence. These are questions we ask of each participant. You do not have to share details; your safety and privacy are important to us. Are you experiencing, or trying to leave, a housing situation where you or a family member feels unsafe because of domestic violence, dating violence, sexual assault, stalking, human trafficking, or violence against you or a family member in your current housing situation?"	If yes: "When did this experience occur?" "Are you currently fleeing or attempting to flee?" "Would you like support or help with safety planning right now?" If yes, provide information on local crisis agencies. - YWCA 24-hour hotline: (616)454-9922 - Safe Haven Ministries 24/7 hotline: (616) 452-6664	Complete Survivor of Domestic Violence for HoH and all adults. If yes - complete when experience occurred and are you currently fleeing for HoH and all adults If no - ensure when experience occurred and are you currently fleeing fields are blank.
Entry/Exit: Foster Care Complete for all youth ages 18-24	"Were you in foster care on or after your 14 th birthday?"	If yes: "Did you age out of foster care?"	For all youth ages 18-24: Were you in Foster Care on or after your 14th birthday?: Complete based on participant's response. If yes - complete did you age out of foster care? for all youth
Complete the following items for the Head of Household only.			
Complete Coordinated Entry Assessment			Complete Coordinated Entry Assessment by clicking Add • Date of Assessment: today's date • Assessment Location: Kent • Secondary Assessment Location:

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			○ #1 HAP ○ #2 Community Rebuilders ○ #3 Family Promise ○ #4 MTM ○ #5 Degage ○ #6 Catherine's Health Center ○ #7 Arbor Circle ○ #8 AYA ○ #9 HOT ○ #10 Pine Rest ● Assessment Type: Phone or In Person ● Assessment Level: Housing Needs Assessment ● Prioritization Status: Placed on prioritization list Save Assessment to close. Responses should always look like this: 
Complete Coordinated Entry Event			Complete Coordinated Entry Event by clicking Add ● Start Date: today's date ● Date of Event: today's date ● Event: Referral to scheduled Coordinated Entry Housing Needs Assessment Save Event to close. Responses should always look like this:

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Complete Current Living Situation	If you are engaging with the client at the place they are staying, you do not need to ask and can list this current living situation. If you are not: “Where are you currently staying?” Location Details: if staying outside: “Can you tell me about the area where you stay, like a nearby street or park?”	If possible, get a detailed description of the location (ex.: park names, business names, address and/or major cross street, color of tent, color/make/model of car, partial license plate. If clients are uncomfortable giving an exact spot, the general location is fine. “Collecting detailed information helps us coordinate outreach team services and can make it easier for us to document your experience with homelessness, which is required if you receive certain resources.”	Complete Current Living Situation by clicking Add • Start Date: today’s date • Information Date: today’s date • Current Living Situation: Select the location where the participant is currently staying. • Living situation verified by: Lookup and select your agency if you visibly witnessed the participant staying outside • Location details: if staying outside, provide a detailed description of the location (ex.: park names, business names, address and/or major cross street, color of tent, color/make/model of car, partial license plate Save Recordset to close.
Add or Update Contact Information	“Next I’m going to ask about some ways we can get in touch with you. If you are selected for a resource, you can expect to hear from a staff member who will determine whether you meet eligibility criteria and provide information about intake. It is important to keep your contact information updated		Add or update Contact Information by clicking Add • Start date: today’s date • List participant’s current phone number(s) and email address(es) with Contact Type as Self • If desired, add case manager phone and email with Contact Type as Other • If desired, list someone with phone or email who can take a message with Contact Type indicating the appropriate relationship

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	with your shelter or outreach worker, or The Salvation Army, and you can notify them of that change as often as needed. You can also add other contacts (such as a case manager or advocate, family member, or trusted friend) who can help get in touch with you if needed.” “Are there are phone numbers where we could reach you by call or text?” (Confirm digits) “Is there an email address we can reach you by?” (Confirm spelling) “Do you have a case manager or advocate that you would like us to contact in case we cannot reach you?” (Confirm information) “Are there any other contacts, like a family member or friend, who can help us get in touch with you if we cannot reach you?” (Confirm information) "If your phone number changes, please contact me or someone at my		

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	organization so we change your number in the data system. It is VERY important that we change your contact details if they change so that the housing agencies can contact you."		
Complete Participant Review			Once you are done with one household member, scroll to the bottom and click "Save". Complete necessary information for all household members. Once information has been completed for all household members, scroll to the bottom and click "Save & Exit". If the Encouraged Answer Alert pops up, go back and answer those questions. 
Complete Exit Assessment			Complete an Exit Assessment for the next day. (ex. entry is 8/1/2024, exit will be 8/2/2024) The entire HH should be added to the Exit. Select the box next to the correct household to ensure all household members are added.

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Finish the conversation	“Thank you for taking the time to complete the assessment today. You will hear from somebody if you are connected to a housing resource. Some people do not receive a match through this system, so it is important that you continue to pursue other housing options.”		

Frequently Asked Questions

Q: What is a housing assessment?

A: A housing assessment is the first step to getting housing resources through Coordinated Entry. Completing a housing assessment doesn't guarantee a resource, but it is the first step to getting help and we can go from here.

Q: How long is this assessment good for? When should I call back? Do I need to update my information?

A: This assessment will be good for 90 days, unless there has been a significant change to your homelessness situation or if you have a change to your contact information.

Q: Do I have to answer all these questions? What if there are questions I don't want to answer? Will that affect my eligibility?

A: You do not have to answer every question. Sharing information is always your choice, and you will not be denied services for choosing not to answer certain questions. The questions are asked to better understand your situation so we can match you to opportunities as they become available. Answering as honestly as you feel comfortable can help make sure any future housing or support is a good fit for you. You can skip questions, take breaks, or update your answers later if things change.

Q: Why do you ask about race and ethnicity?

A: We want to make sure that we understand any gaps in the services we offer at a systems level. This information is not used to determine whether you are connected to a housing resource. Instead, we are working to ensure the system avoids discrimination and stereotypes by uncovering and working to eliminate the negative impacts of discrimination and racism, rather than to cause them.

Q: What if this information is used to discriminate against me or to stereotype my family or community?"

A: These concerns are valid and important. A lot of communities share this fear. However, we want to get to know you better and want to make sure that the community understands gaps in the services we offer, at a systems level. We are trying to avoid discrimination and stereotypes and figure out how to tailor our support to your unique needs. Individual information privacy will be protected by privacy legislation. When we are using and analyzing your personal information, the goal is to uncover and work to eliminate the negative impacts of discrimination and racism, rather than to cause them. The more open and honest you are during this assessment, the better we can understand your needs and find resources. None of the programs in CE use race or ethnicity to decide who can get help, and we also don't use that information when we do the assessment.

Q: How can I get a voucher for RRH or PSH? My family member/friend got funding from a local agency, how can I get the same resource?

A: Coordinated Entry (CE) focuses on helping households prioritized using consistent criteria about safety, health, and housing access. Completing an assessment is only the first step in being considered for help; housing may not be immediately available and is not guaranteed. Because housing projects and funding sources frequently change, it cannot be guaranteed that you will receive the same resource as another household.

Q: I've done this multiple times, why haven't I gotten a resource? Do you ever have resources available?

A: Coordinated Entry (CE) focuses on helping households prioritized using consistent criteria about safety, health, and housing access. Unfortunately, we cannot guarantee a resource for everyone. We do not maintain a waitlist for resources. When resources do become available, they are offered based on priority and eligibility at that time, and completing an assessment helps make sure you're considered when opportunities do come up.

Q: How long will it take to pull my name for housing? When will I get called for a voucher?

A: There isn't a set timeline, and we are not able to predict when someone will be matched to housing. The wait depends on factors like what resources become available, eligibility requirements, and how many people are waiting. Some people do not receive a match through this system, so it is important that you continue to pursue other housing options.

Q: I don't have a phone or email address/my phone number changes a lot. How can I make sure I am contacted for a resource if one is available? Will I be taken off the list if I miss the call?

A: If you are selected for a resource, you can expect to hear from a staff member who will determine whether you meet eligibility criteria and provide additional information about intake. It is important to keep your contact information updated with your shelter or outreach worker, or The Salvation Army, and you can notify them of that change as often as needed. You can also add other contacts (such as a case manager or advocate, family member, or trusted friend) who can help get in touch with you if needed.

Q: What is the point of this/what do I do if there are no housing resources available?

A: Completing a housing assessment helps make sure your story, needs, and strengths are documented and understood. While it may not lead to immediate housing, this assessment can help connect you to opportunities as they become available, while reducing the burden on you to repeat your story and advocate for yourself. You can work with your shelter or outreach worker or can call 2-1-1 for information on additional community resources.