



CES FAMILY PRIORITIZATION – SHELTER
(FOR CES SHELTER PROVIDERS)

WORKFLOW



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PURPOSE

The purpose of this workflow document is to explain the CES process for assessing families and prioritizing for shelter beds when available. The overall goal of this new process is to better prioritize families in need based on community agreed-upon prioritization factors. This process moves away from using the VI-F-SPDAT as a requirement for entry into shelter and instead utilizes a CES Shelter Matching Tool. You will no longer need to administer a Big 3 to assess a family for shelter: you only need a completed CES Shelter Matching Tool and an ROI. This tool will:

- ▶ Shorten the assessment process
 - ▶ Deliver the assessment in stages (if needed only)
 - ▶ Prioritize vulnerable populations based on community criteria – not a score
- » The purpose of this new staged assessment process is to only collect the information needed to determine need for shelter. These stages are dynamic, meaning that they will meet clients where they are at and focus on the right intervention at the right time (not every family needs shelter or a housing program)

TIMELINE

Stage 1 - Diversion

Upon first meeting with a client, the 1st step is always: DIVERSION

- ▶ The Diversion conversation is the first intervention provided to any client who presents with a housing need regardless of eligibility or population type
 - ▶ Diversion should be attempted at every access point at every phase/stage
- » If Diversion with a client is not successful AND they are a family seeking shelter, move to...

Stage 2 – CES Shelter Matching Tool

- ▶ This tool will be used to prioritize families for CES participating shelters in Orange County – Coalition for the Homeless, Family Promise, and Salvation Army
 - ▶ This tool should be administered to families seeking shelter
 - ▶ This tool can be used in conjunction with a Regional Big 3, but it is not necessary for a family to receive a Regional Big 3 to enter shelter – they only need the CES Shelter Matching Tool and an ROI
 - ▶ This tool will be an assessment in HMIS, which will populate onto a Report Writer Report
 - ▶ CES will prioritize families on the report by the agreed-upon community prioritization factors for shelter and send it to the shelter providers when they indicate availability
- Shelters will call down the provided list to fill any shelter availability
- » If Diversion is unsuccessful and the family does not want to enter shelter, proceed with the Regional Big 3 assessment utilizing the Regional BIG 3 EDA
- ▶ Orange County- Provider 923



- ▶ Osceola County- Provider 924
- ▶ Seminole County- Provider 925

» If Diversion is unsuccessful and the family enters shelter, complete the shelter entry and ROI. Continue the conversion in shelter for 30 days to conduct a Rapid Exit before completing the VI-F-SPDAT. A client will not pull onto the registry until the complete BIG 3 have been completed.

Stage 3- BIG 3

- ▶ Participating agencies/users completing the standard intake assessment for clients presenting as homeless should prescreen the client to determine if a full assessment is necessary. Full assessments should only be completed on clients that present as meeting the criteria for available programs managed through CES. Each user completing an assessment should be familiar with the program requirements in order to determine if a full assessment should be completed. In general, you will screen in and assess the following 3 populations:
 - Street Homeless/Emergency Shelter homeless families with minors
 - Chronically Homeless Disabled individuals
 - At-Risk or Homeless Veteran individuals or families that do not have dishonorable discharge
 - ▶ If client is screened in, a full intake assessment will be completed, which includes: ROI, CoC Entry, VI-SPDAT, as well as case notes and client contact info.
- » Once a full assessment has been completed on a client, they will officially populate onto the CES Registry. The registry is the master list of all homeless clients in our CoC. Our CoC currently manages four registry meetings weekly to focus on Veterans, Homeless Families, Homeless Youths and Chronics
- » Once the client populates onto one of the various registry reports (Veterans, Families, Chronic, Youth) they are sorted from most vulnerable to least vulnerable, per VI-SPDAT score. At each week's registry meetings, Navigators are assigned to the most vulnerable clients first to follow up from their initial assessment. CES will only be prioritizing families for Navigation if case management slots will be available within the coming month.

SHELTER ACCESS

The CES Shelter Matching tool should be completed for families who express an interest in shelter. The information collected should be inputted into HMIS (CES Shelter Registry located under the "Assessment Tab) along with an upload of the ROI. CES will prioritize families for shelter based on the criteria the family meets at time of the CES Shelter Matching Tool (See [Exhibit A-B](#)).

- » This information should ONLY be filled out for the Head of Household (Self)
- » This information should ONLY be collected for families seeking shelter
- » Families do NOT need a full assessment (BIG 3) to enter CES participating shelters
- » Any access point that assesses families can administer a CES Shelter Matching Tool – you do not need to refer the family to a HUB



DATA ENTRY IN HMIS

Client - (90057) ZZ-Doe, ZZ-John



(90057) ZZ-Doe, ZZ-John

Release of Information: None

-Switch to Another Household Member-

Submit

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Measurements

Assessments

Select an Assessment

CES Shelter Matching Tool

Submit

- » Go to Head of Household's Client Profile (or if they are not in the system, create one and add household)
- » Go to "Assessments" Tab
- » Select "CES Shelter Matching Tool" from the drop-down menu
- » Under "Shelter Matching Tool, click "Add"

CES Shelter Matching Tool



SHELTER MATCHING TOOL



Shelter Matching Questions

	Start Date *	Are you pregnant?	What is your current living situation?	How long have you been in the above homeless situation?	Number of Adults:	Number of Children:	Ages and Genders of Family Members:	Fleeing a dangerous situation?	Medical Condition:	Client Contact Info	End Date
	01/04/2019	Yes	Imminent Risk	Two to six nights	2	3	M(24), F(23), F(4), M(3), M(0)	No	No	555-555-5557	
Showing 1-1 of 1											

Add

- » Enter answers to the Shelter Matching questions in the appropriate fields
 - ▶ "Start Date" should be date the tool was completed
 - ▶ Please note the formatting examples provided for some of the questions

Ages and Genders of Family Members:
Example, F(32)
M(31) M(5)

- » **IMPORTANT** – Do not end date the assessment
 - ▶ That will be utilized by Shelter/CES staff ONLY
- » Hit "Save" at the end of the assessment tool



EMERGENCY SHELTER BED ASSIGNMENTS

After the CES Shelter Matching Tool has been entered into HMIS (as shown above), the family will populate onto a CES Shelter Registry using Report Writer.

- ▶ This tool will allow us to see all added assessments for families in real-time.
- ▶ CES will filter and assign priority ranks to the families on the Registry using the agreed-upon shelter prioritization bucket criteria.
- ▶ When availability is indicated by the shelter, the prioritized Registry list will be sent and shelter staff will call-down the list until they have filled the bed.
- ▶ The shelters will utilize a Shelter Tracking tool in HMIS to assist them and track outcomes.
- ▶ If the family exceeds 90 days on the shelter Registry, they will be removed and will need to be reassessed for shelter services to be put back on.

The Shelter Tracking Tool located under the CES Shelter Matching Tool assessment in HMIS will be used to track progress in contacting clients for available shelter beds.

NEXT STEPS



» Initial Communication:

- ▶ The Emergency Shelter will email CES with bed openings.
 - ▶ CES will immediately pull Shelter Matching Tool Report
 - ▶ CES will send corresponding Excel sheet with a list of clients
 - ▶ Sheet will be filter in accordance to the priority buckets
- ▶ Shelter staff would need to filter the household size tab in accordance to available bed accommodations

» Shelter Outreach- Initial Contact & Entry into Shelter

- ▶ Once the shelter has received the Shelter Matching Tool Report the Shelter will seek to contact families to facilitate admission into shelter
 - ▶ Shelter staff will make at least one-attempt over a 2-hour period to contact the family to inform them of the availability of shelter space.
 - ▶ If list has been exhausted and bed has not been filled, go through list again. After 3 attempts and no contact change status to unable to contact and end date the assessment tool
 - ▶ For each contact attempt, a Shelter Matching Case Note should be added to indicate the time of the call and who made the contact



Shelter Matching Case Note			
	Start Date *	Case Note:	End Date
 	01/04/2019	1:42 pm Coalition for the Homeless called CES assigned client for shelter. Client did not answer phone, left a voicemail for client to call me back within the next 24 hours if still in need of shelter. BB	01/04/2019
<input type="button" value="Add"/>		Showing 1-1 of 1	

» Each Case Note should reflect the following information:

- ▶ Start date is the date of the initial contact
- ▶ Time that call was made
- ▶ Who made the call
- ▶ If the client was CES assigned
- ▶ Outcome of the call
- ▶ Name of who placed the call
- ▶ *End date can be the same day – this is not necessary information for a case note

SAMPLE SHELTER FOLLOW UP SCRIPT:

This script is to be used by Emergency Shelter staff who are following up with clients to offer them shelter.

My name is []. Are you in a safe place to talk?

If YES: *I work at []. I am following up regarding the Coordinated Entry Shelter Matching Tool that you completed that indicated that you were in need of shelter. I am calling to follow up about that need. I want to find out some information about your situation and see if there are any services that we can provide.*

If NO: *Please call back when you are in a safe place to talk.*

Complete Diversion Conversion

If Diversion Unsuccessful and If still in need of shelter:

It sounds like you are not residing in an ideal place with your family. We have space available in our shelter for you and your family if you would like it. This will allow you to stay in a temporary location while our shelter case managers assist in navigating you through the process to having you obtain permanent housing and self-sufficiency. (Explain a little bit about the shelter set up – i.e.: what type of room client would be in, shelter expectations, etc.)

Invitation to Shelter: *Would you and your family like to come into shelter?*

- ▶ *If Yes: Gather contact info and schedule intake assessment*
- ▶ *If No: Ask: Is there a specific reason why you are declining shelter? Attempt to address client's concerns about entering shelter. Notate accordingly*



OUTCOMES

Once a client has been contacted regarding shelter services, the Shelter Outcome Tracking should be used to show progress and who is initiating contact

Shelter Outcome Tracking

Shelter Agency Name	-Select- ▼ G
Shelter Outcome	-Select- ▼ G

- » In “Shelter Agency Name”, select your shelter from the drop-down menu once you have placed your first call
- » In “Shelter Outcome” select “Contact in progress” - this will let other shelters know that they do not need to contact this client yet

Shelter Outcome Tracking

Shelter Agency Name	Coalition for the Homeless ▼ G
Shelter Outcome	Contact in progress ▼ G

- » Shelter Outcome will be changed once the client has been accepted into shelter and completed intake, or is closed out due to declining services, being ineligible for services, or unable to contact

Shelter Outcome Tracking

Shelter Agency Name	Coalition for the Homeless ▼ G
Shelter Outcome	Contact in progress ▼ G
<input type="button" value="Print Assessment"/>	

-select-
 Contact in progress
 Ineligible for services
 Unable to contact
 Accepted into shelter
 Declined shelter

- » When client is accepted into shelter, declined shelter, ineligible for services, or unable to contact, they will be closed out and will not populate onto the Shelter Registry until they are reassessed for shelter services
 - ▶ To close out the client, “end-date” their Shelter Matching Tool assessment and click “Save”

End Date (Shelter/CES use only)	<input type="text"/> / <input type="text"/> / <input type="text"/>    G
<input type="button" value="Save"/>	

- ▶ Client would also have their Shelter Matching Tool assessment “end-dated” when they have exceeded 90 days on the shelter Registry and need to be reassessed for shelter services. This will be done by CES Staff.

EXHIBIT A – PRIORITIZATION FACTORS AND QUESTIONS FOR SHELTER

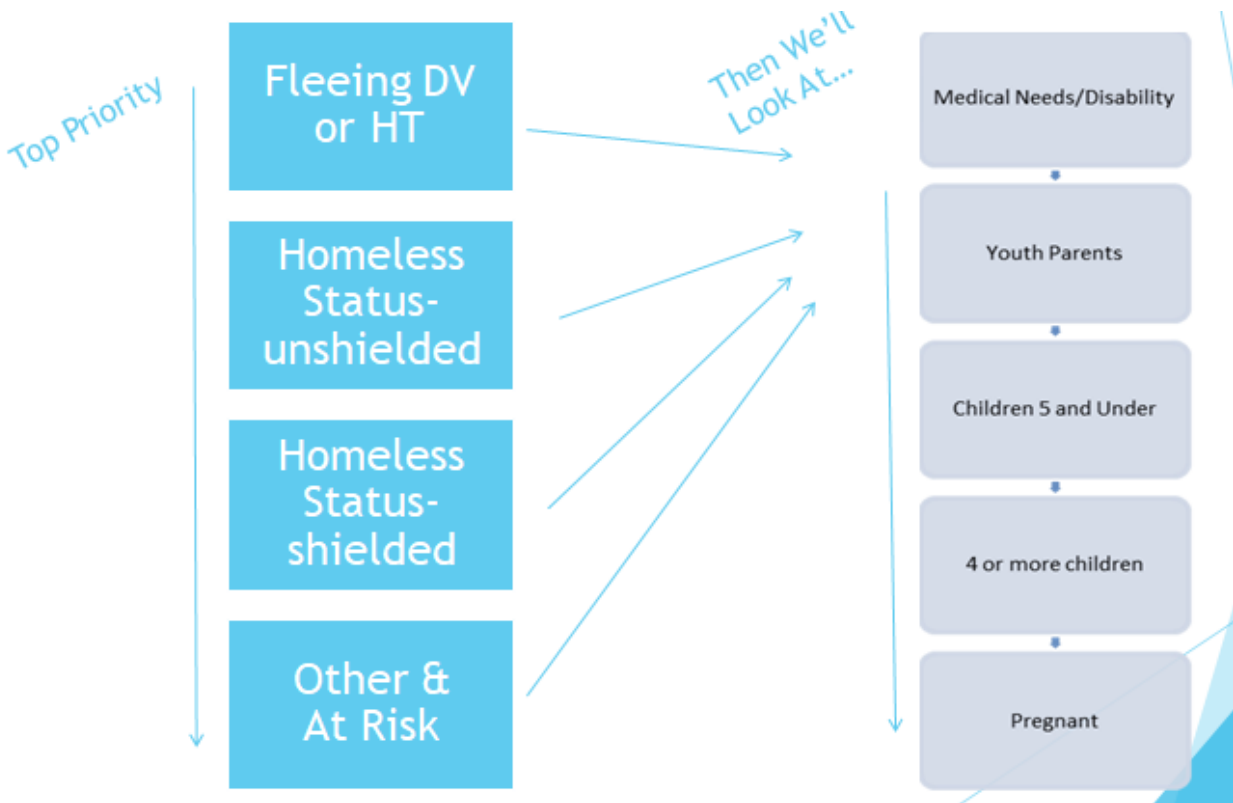




EXHIBIT B – PRIORITIZATION “BUCKET” DEFINITIONS FOR SHELTER

Prioritization Factors: Defined

» Housing Situation

- ▶ Cat. 1 Unshielded
 - ▶ A Category 1 situation in which the family is unshielded (ie: no roof)
 - ▶ Example: Park, woods, tent, bus station, under overpass
- ▶ Cat 1. Shielded
 - ▶ In a Category 1 Situation in which the family is shielded (ie: roof)
 - ▶ Example: car, abandoned building, airport, agency paid hotel, timing out of DV shelter
- ▶ At Risk
 - ▶ Losing housing (including rental, staying with family/friends, self-pay hotel) within 7 days
- ▶ Fleeing a Dangerous Situation
 - ▶ A family who is in a dangerous living situation (ie: DV or Human Trafficking) and is attempting to flee that situation

» Priority Groups

- ▶ Medical/Disability
 - ▶ Criteria: Client self-reports someone in their family has a medical condition in which their current situation is impacting their ability to maintain a treatment plan OR someone has a disability making them vulnerable to harm or danger while in their homeless situation.
 - ▶ Questions:
 - ▶ Do you or your children have a medical condition in which your current living situation is impacting your ability to maintain a treatment plan? Yes No
 - ▶ Do you or children have any disabilities that make you vulnerable to harm or danger?
 - ▶ Yes No
- ▶ Youth Parents
 - ▶ Criteria: Parents between the ages of 18-24 who have minor children in their household
 - ▶ Question:
 - ▶ Will be gathered with household data
- ▶ Children 5 and Under
 - ▶ Criteria: Any household with at least one child age 5 or under
 - ▶ Question:
 - ▶ Will be gathered with household data
- ▶ 4 or more children
 - ▶ Criteria: Any household with 4 or more children



- ▶ Question:
 - ▶ Will be gathered with household data
- ▶ Pregnant
 - ▶ Criteria: Any household in which someone self-reports they are currently pregnant
 - ▶ Question:
 - ▶ Expecting\Pregnant: Y N (circle one)