



HMIS Navigation Checklist

Please note: This is only a checklist and not an in-depth explanation of the CES Navigation Workflow Process. Please refer to full training document for complete CES Navigation Workflow.

- ┌ **EDA: Regional Big Three** _____
 - 923- Orange County
 - 924- Osceola County
 - 925- Seminole County
- ┌ **Initiate Contact:** Contact should be initiated within 2 business days of assignment
- ┌ **Navigation Tracking Sub-Assessment** (located in the Assessments tab)
 - Update “Participant Current Living Situation Status” when you *first* make contact with via phone, email, text.
 - REMEMBER: Always verify homelessness (self-report) on initial contact. Only move forward with navigation if participant is currently Category 1 homeless.
 - Update “Navigation End Date” and “Navigation Outcome” when exiting a participant from Navigation (see below for additional details)
 - Once participant has been exited from Navigation, make sure to also close out the three fields below the Navigation Tracking Sub-Assessment.

Community Navigator Agency	-Select-	▼ G
Client Status	-Select-	▼ G
Navigator	-Select-	▼ G

- ┌ **CES Case Notes**
 - Place a case note for each interaction with a participant in the CES Case Notes section immediately, but no later than 2 business days from date of interaction. (Located under the Navigation Assessment)
 - Case Notes should be completed on a weekly basis for continuity of service and status updates.
 - Case Notes is essential in accounting your work.
- ┌ **Case Manager Tab**
 - Assign self as case manager under your Big Three EDA provider at first contact with participant *if* you will move forward with navigation services.
 - Close self out as Case Manager once you have exited the participant from navigation
- ┌ **Documentation:**
 - A participant cannot remain on a navigator’s caseload for more than 60 days from date of assignment. It is imperative that navigators continue to work with participant to gather and upload all necessary documentation per eligibility requirements as quickly as possible.
 - Upload all documents under the File Attachment section under the Client Profile Tab in HMIS.
- ┌ **Referral:**
 - Once a participant is document ready, the Navigator should send a referral in HMIS (Located under Service Transaction Tab) to CES RRH 811.
 - A review will be completed by CES for approval or denial.
 - Accepted: Participant will be placed on Approved List for Housing Case Management assignment.
 - Decline: Email will be sent to navigator with explanation of denial reason and if referral can be resubmitted.
 - Pending: CES staff is awaiting missing documentation to proceed with Acceptance. Email will be sent to navigator advising of pending status and need for missing or corrected document to be uploaded.



Navigation Outcomes Defined

┌ **Referred to CES and Accepted**

- Definition: Accepted in a CES RRH or PSH program
- When to Close: On date participant is assigned to a housing case manager
- Client Status:
 - Deselect and leave blank

┌ **Referred to CES and Declined, Participant Deemed Ineligible**

- Definition: Participant is officially ineligible for all CES programs (ex: Over income)
- When to Close: On date you notified participant of their ineligibility status
- Client Status:
 - Over income if participant is over 50% AMI
 - Ineligible for RRH services if no longer have children in custody

┌ **Participant Deemed Ineligible at time of Navigation Assessment**

- Definition: During navigation, participant was deemed ineligible (ex: participant not in Category 1 situation)
- When to Close: On date you determined eligibility status
- Client Status:
 - Ineligible for RRH services if no minors in custody
 - Housed if in self paid hotel or staying with family/friends

┌ **Unable to make contact with participant**

- Definition: You have not made contact with participant at all
- When to close: After at least 3 attempts have been made to get in contact
- Client Status:
 - Whereabouts Unknown

┌ **Participant declined services**

- Definition: Participant outright declines services OR you made at least initial contact with the participant, and then the participant later ceased contact
- When to close: On date the participant declined services OR after making three attempts to get back in touch
- Client Status:
 - Not interested in housing

┌ **Participant referred to Non-CES Housing program**

- Definition: You helped the participant get connected to a non-CES program.
- When to close: When they have been officially accepted by the other program
- Client status:
 - Ineligible for RRH Services

┌ **Transferred navigation to another agency**

- Definition: The navigation for this participant was transferred to another CES agency
- When to close: On date that they were transferred
- Client status:
 - Deselect and leave blank