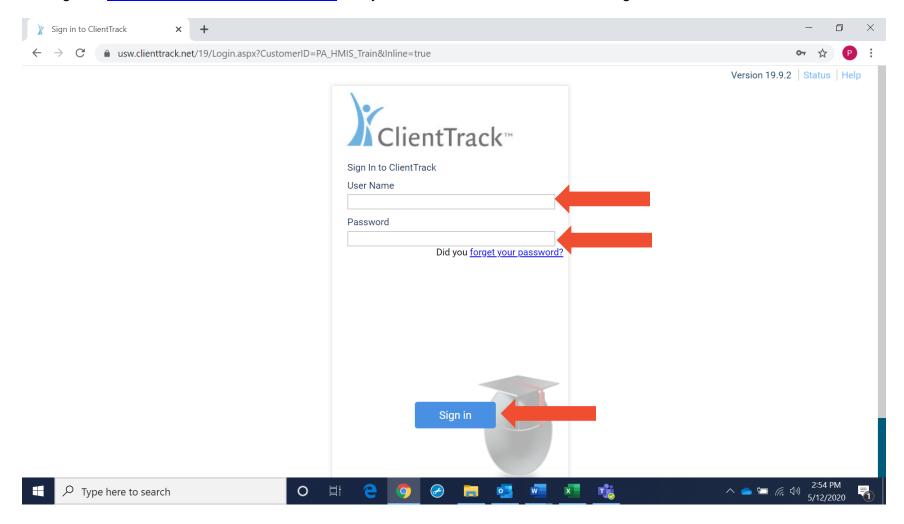
COMPLETING A DV ANON ASSESSMENT



This tutorial is expected to be the workflow until a customized DV Intake Workflow can be developed. As such, we will need to mark CLIENT REFUSED for many fields and create our own DV ANON name for the client.

1. Log-in to https://www.clienttrack.net/pa_hmis with your Username and Password, click Sign-In

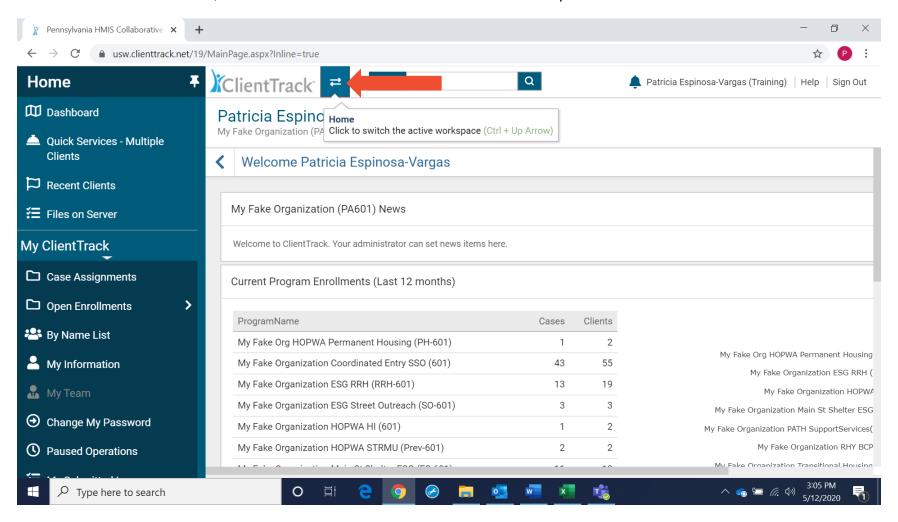


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COMPLETING A DV ANON ASSESSMENT



2. While on the Home screen, click to Double Arrows to switch to a different Workspace

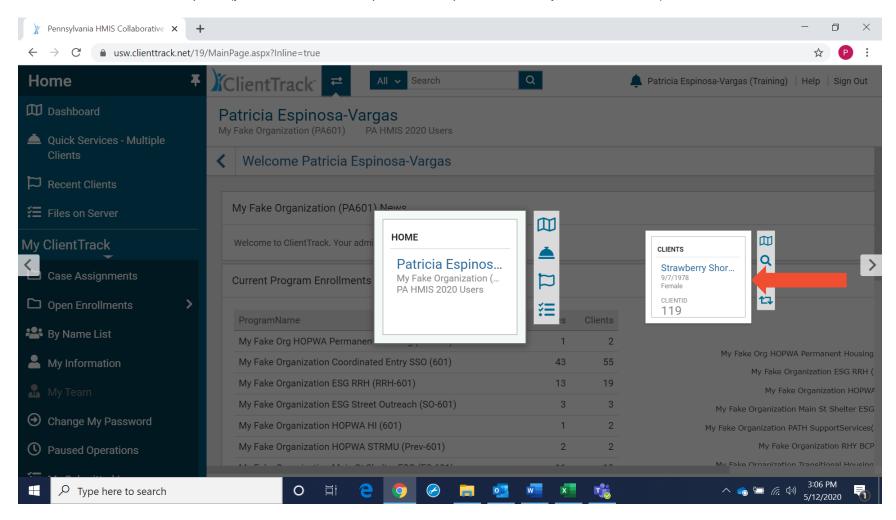


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COMPLETING A DV ANON ASSESSMENT



3. Click the Clients Workspace (you should see a snapshot of the previous client you searched for)

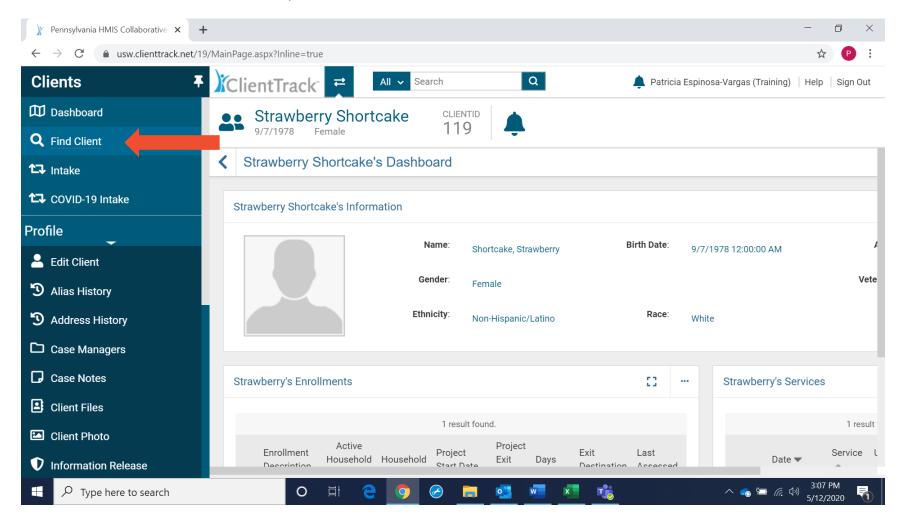


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COMPLETING A DV ANON ASSESSMENT



4. While at the Client Dashboard screen, click Find Client



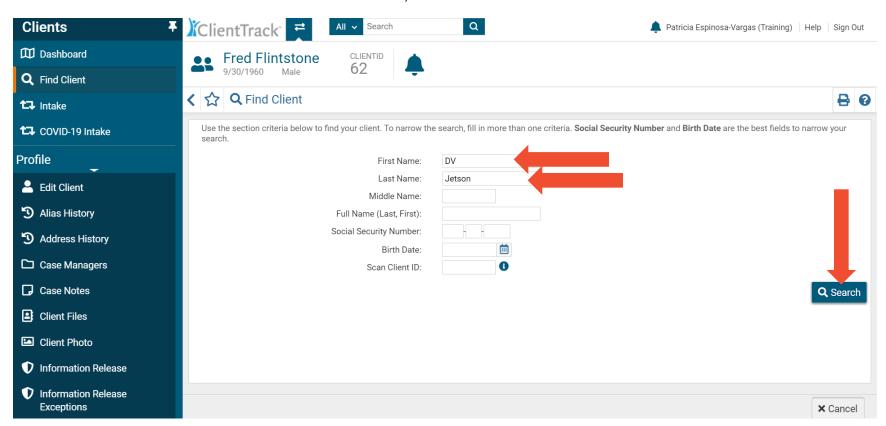
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COMPLETING A DV ANON ASSESSMENT



Please read the following: "You have chosen to have your information into our secure data system anonymously, we must ask that you now choose a passcode. This passcode will be used to identify you as services reach out. You may choose any alphanumeric passcode as long as it has not been chosen by someone else, and it is not related to your name. What passcode would you like to be identified by?"

- 5. Search HMIS by the following:
 - a. First Name: DV
 - b. Last Name: Their chosen passcode
 - c. Click Search
 - If a client in HMIS already has this passcode, please ask that the client choose another password (they may add a digit after if that is what the client chooses i.e. Jetson1)

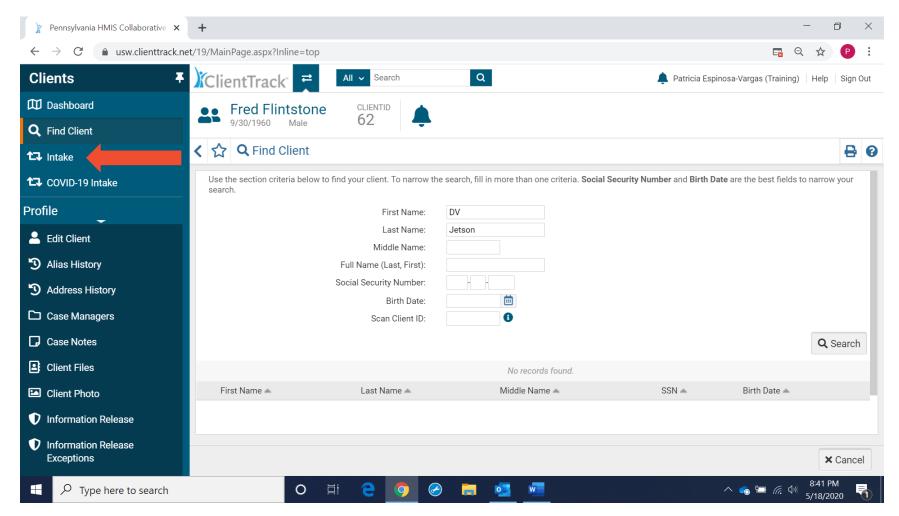


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COMPLETING A DV ANON ASSESSMENT



6. Assuming no results were found, Click Intake

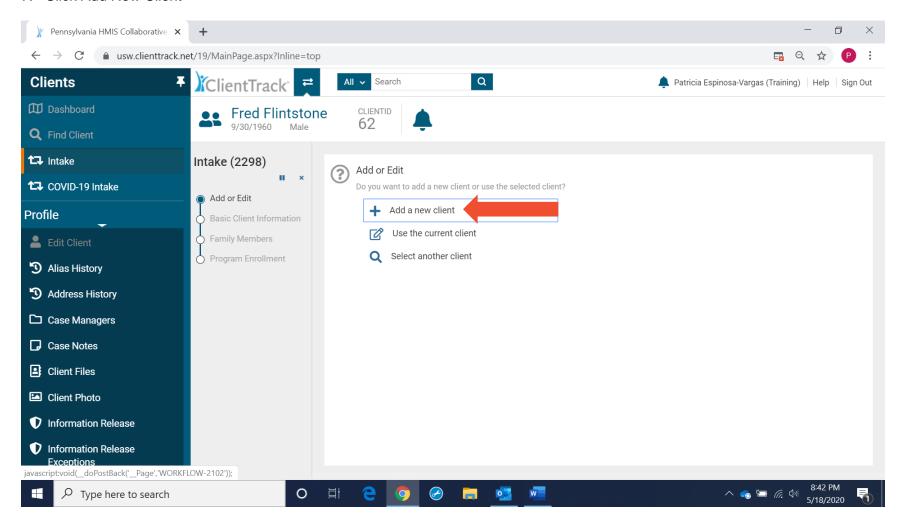


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COMPLETING A DV ANON ASSESSMENT



7. Click Add New Client

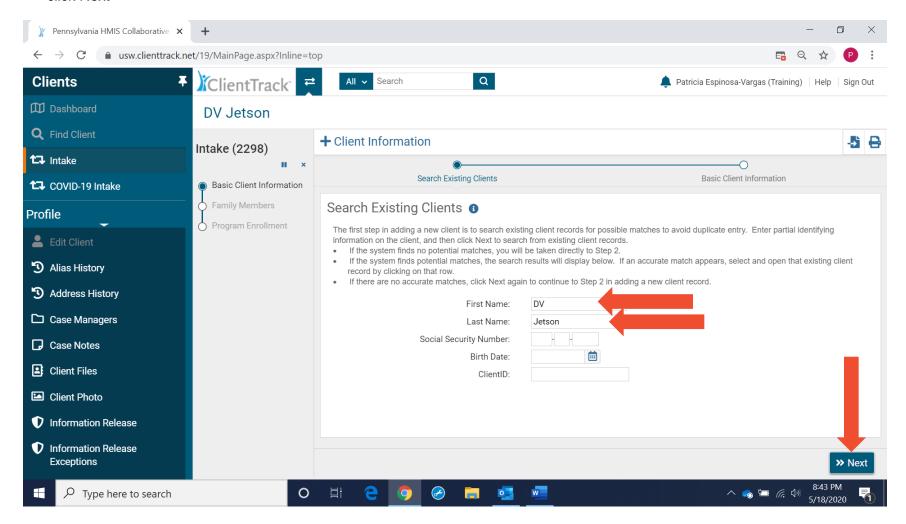


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COMPLETING A DV ANON ASSESSMENT



8. Search the system one more time, please type in **DV** as the **First Name** and client's **chosen Passcode for the Last Name**, then click Next



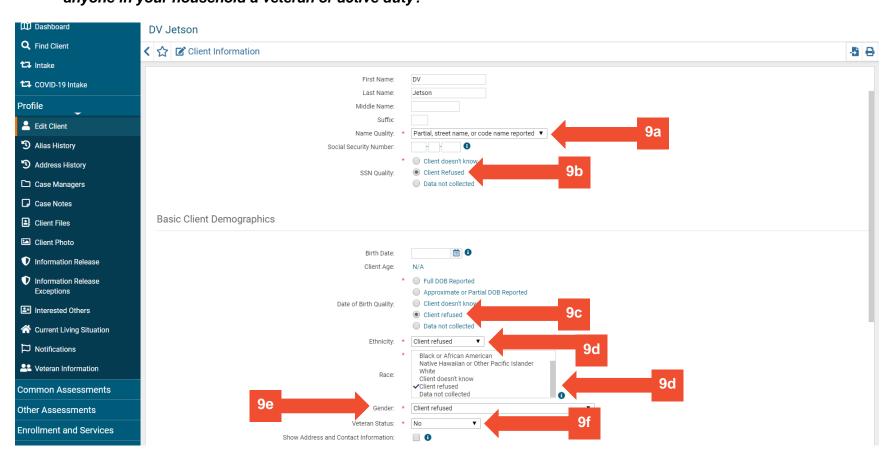
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COMPLETING A DV ANON ASSESSMENT



- 9. Complete the following as indicated:
 - a. Name Quality: Partial or Code Name
 - b. SSN Quality: Client Refused
 - c. Date of Birth Quality: Client Refused
 - d. Race/Ethnicity: Client Refused
 - e. Gender: Client Refused
 - f. Veteran Status: Please read the following, then choose the appropriate response...

 "The following question you may choose to refuse to answer if you feel that it is potentially identifying: Are you or anyone in your household a veteran or active duty?"

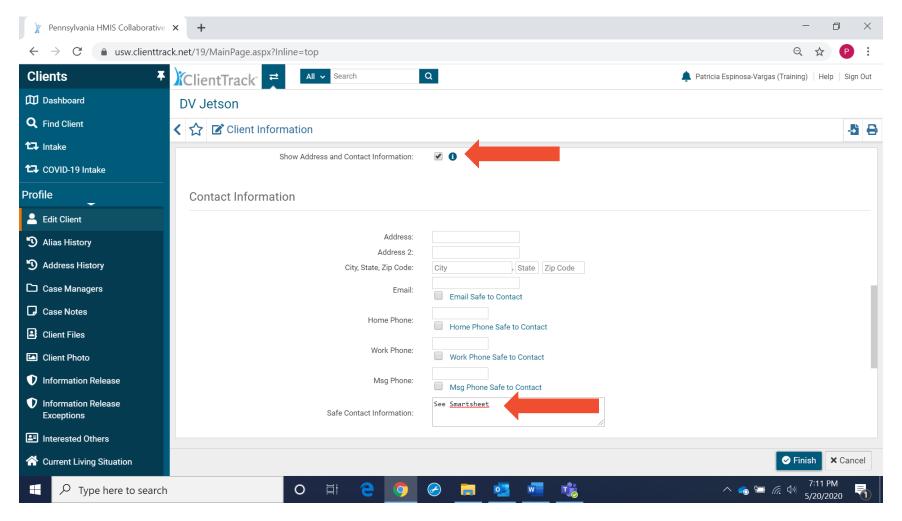


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COMPLETING A DV ANON ASSESSMENT



g. Click the button next to Show Address and Contact Information, then in Safe Contact Information, type "See Smartsheet"

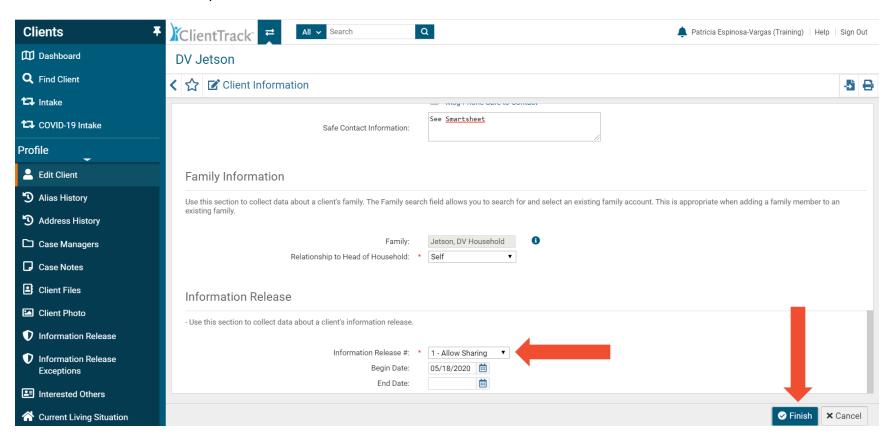


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COMPLETING A DV ANON ASSESSMENT



- h. Choose the appropriate Sharing after reading the following: "Do I have your permission to enter your information into the Eastern Pennsylvania secure data system called HMIS and potentially place your name on the By Name prioritization list for housing services?"
 - Client Consents Fully: 1-Allow Sharing
 - Client opts out of HMIS: 2-No Sharing
 - Note: A client whom opts out of HMIS may still receive shelter referrals verbally (i.e. not electronically)
- h. Click Finish when complete

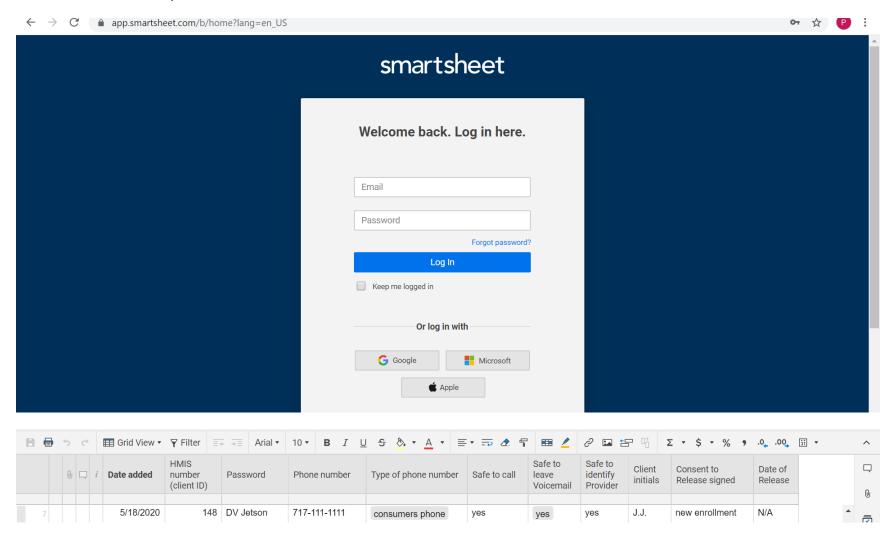


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COMPLETING A DV ANON ASSESSMENT



- 10. Open Smartsheet to enter the client's contact information (https://app.smartsheet.com/b/home)
 - a. Note: Be sure to add the client's contact information to each RHAB/Region the client is looking for services in (you may need to enter their information in multiple regions if for example the client is looking to be housed in Lehigh, Northampton, and Carbon counties)

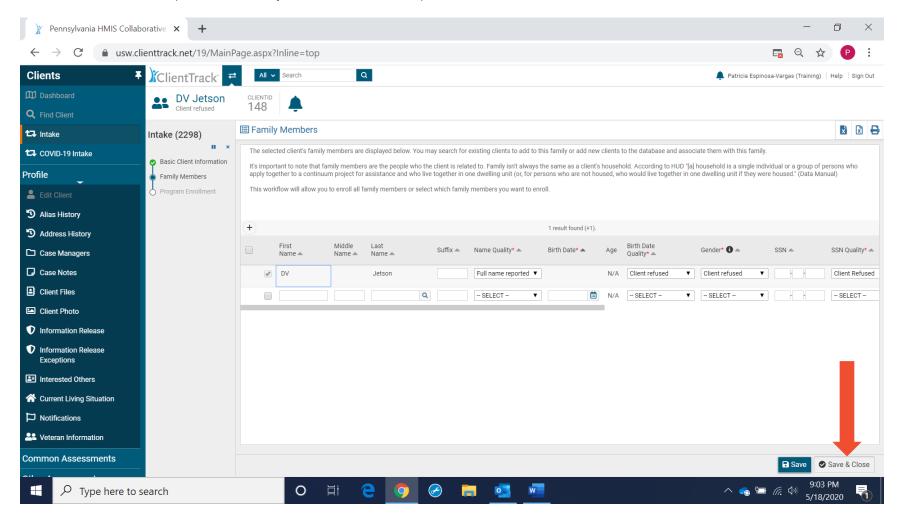


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COMPLETING A DV ANON ASSESSMENT



11. Click Save & Close (do not enter any household members)

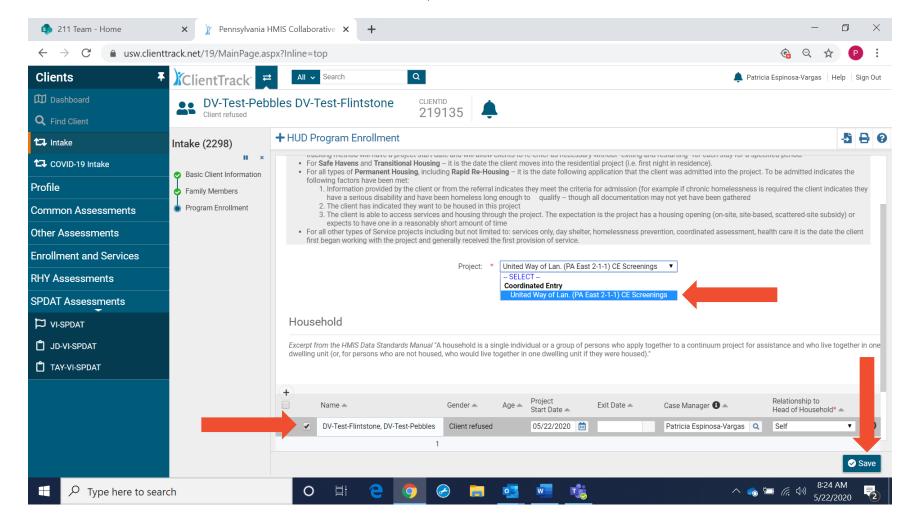


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COMPLETING A DV ANON ASSESSMENT



- 12. Choose your agency that is completing the screening
 - a. Click the checkbox next to the client's DV-Anon Name, then click Save

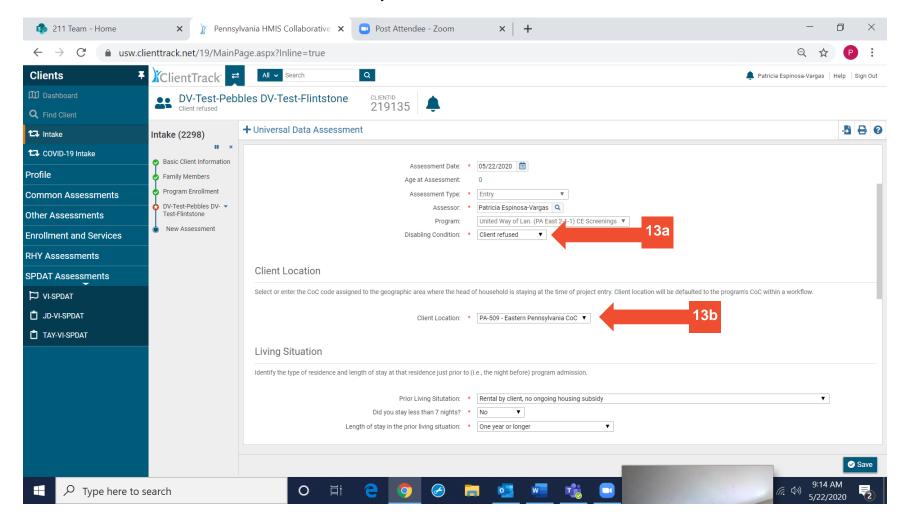


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COMPLETING A DV ANON ASSESSMENT



- 13. Complete the Universal Data Assessment
 - a. Disabling Condition: Please read the following, then choose the appropriate response...
 - "The following question you may choose to refuse to answer if you feel that it is potentially identifying: Do you have a disabling condition which consists of any physical, mental, or emotional impairment, including an impairment caused by drug or alcohol disorder, or brain injury that impedes your ability to maintain housing or employment?"
 - b. Client Location should default to Eastern Pennsylvania CoC



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COMPLETING A DV ANON ASSESSMENT



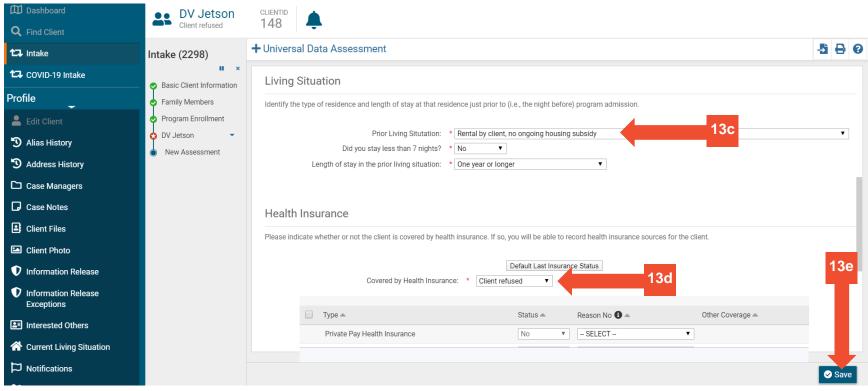
- c. Complete the Living Situation, please note that this question may differ to how we interpreted it in the past. **This response to this question should reflect where the client was sleeping <u>before</u> they entered homelessness (i.e. if they slept on the streets on 5/4/2020, but were at a friend's house the night prior i.e. 5/3/2020, the response to this question in this section would be Staying or living in a friend's room, apartment or house);**
 - If the client has not yet experienced literal homelessness but is CAT 4/Fleeing DV and currently housed you may answer this question by reporting the type of housing they had before they fled to their new location; Or, if they are still in the same home as their abuser, you may answer their current living situation
- d. Health Insurance: This question is not required to be asked by CE Specialists, but is a required field in HMIS, please choose Client Refused and skip all of the Insurance questions

e. Click Save to move to the next screen

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COMPLETING A DV ANON ASSESSMENT





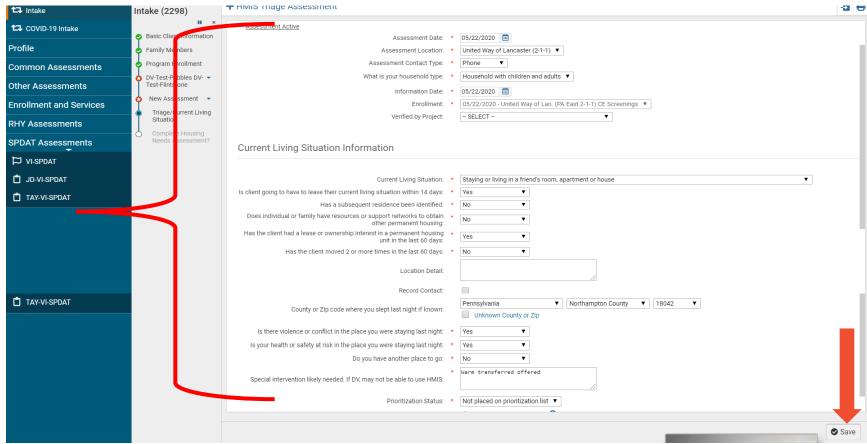
- 14. Complete the Triage Assessment (a combination of the old Prescreening and current DV Triage questions that are asked at the start of the Opening Conversation with a CE Specialist...please replicate the answers that were provided in the initial Opening Conversation with the client). Almost all fields are required except the Verified by Project, that may be skipped. Additionally, while some fields will auto-populate, please note the following
 - a. Assessment Contact Type: For 211, the response should always be Phone, For Access Sites it will likely be In-Person
 - b. Current Living Situation: Where the client slept last night (please do not enter anything into Location Detail)
 - c. Special Intervention Likely Needed: It is helpful to note if the client was provided with or agreed to call a DV Hotline (or refused)
 - d. Prioritization Status: Not placed on prioritization list
 - e. Click Save when complete

13b

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COMPLETING A DV ANON ASSESSMENT



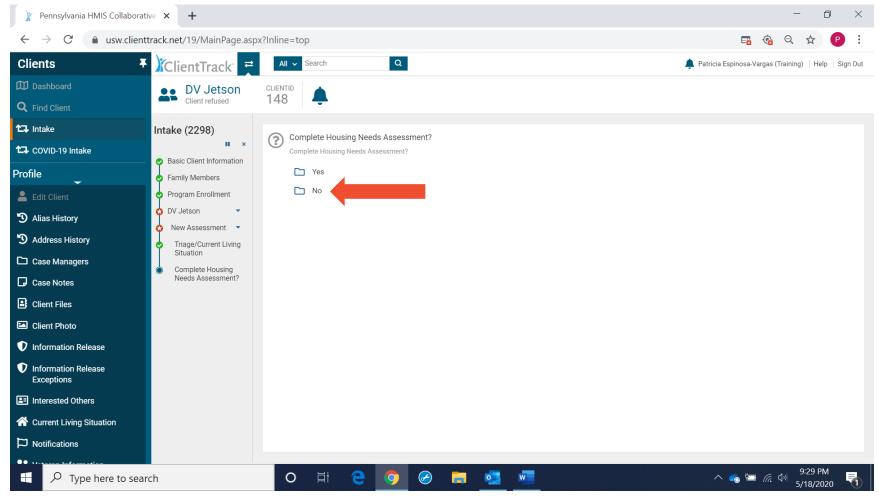


15. Click No for a Housing Needs Assessment

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COMPLETING A DV ANON ASSESSMENT





16. Click Enrollment and Services

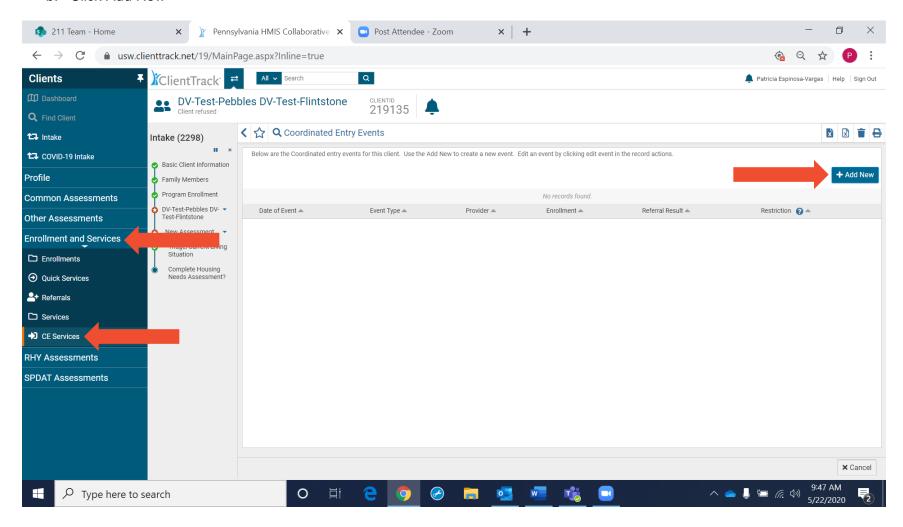
a. Click CE Services

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COMPLETING A DV ANON ASSESSMENT



b. Click Add New



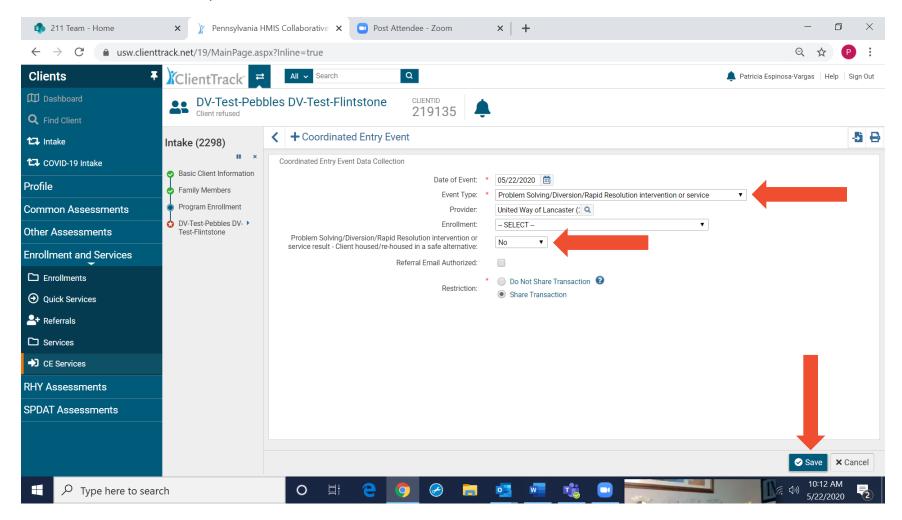
17. We'll need to field the Diversion Assessment Tool, recording if the tool was successful in diverting the household from shelter/prevention services...this should be recorded before we move on to a VI-SPDAT or make Emergency Shelter Referrals

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COMPLETING A DV ANON ASSESSMENT



- a. Event Type: Problem Solving/Diversion/Rapid Resolution intervention or service
- b. Choose Yes or No if you successfully (or unsuccessfully) diverted the client from shelter/services
- c. Click Save when complete



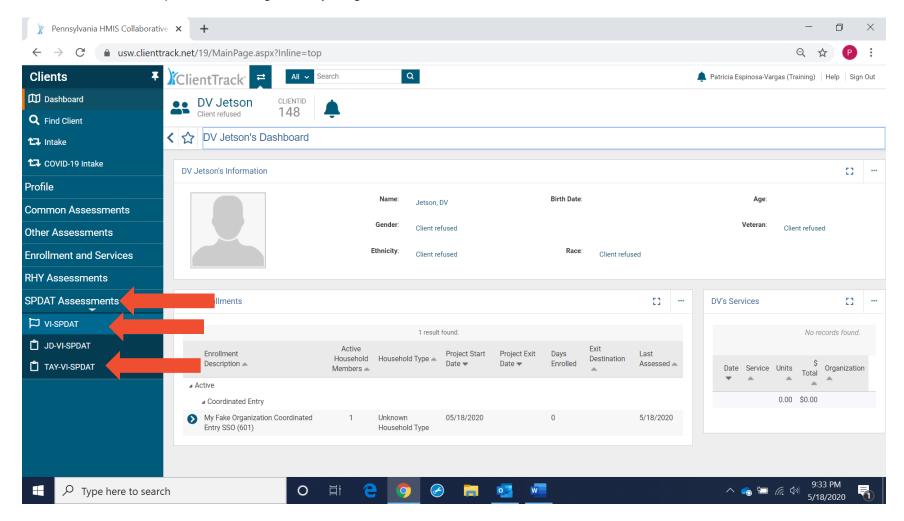
- 18. Click SPDAT Assessments
 - a. If a Single or Family, click VI-SPDAT

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COMPLETING A DV ANON ASSESSMENT



b. If an Unaccompanied Youth age 24 or younger, click TAY VI-SPDAT

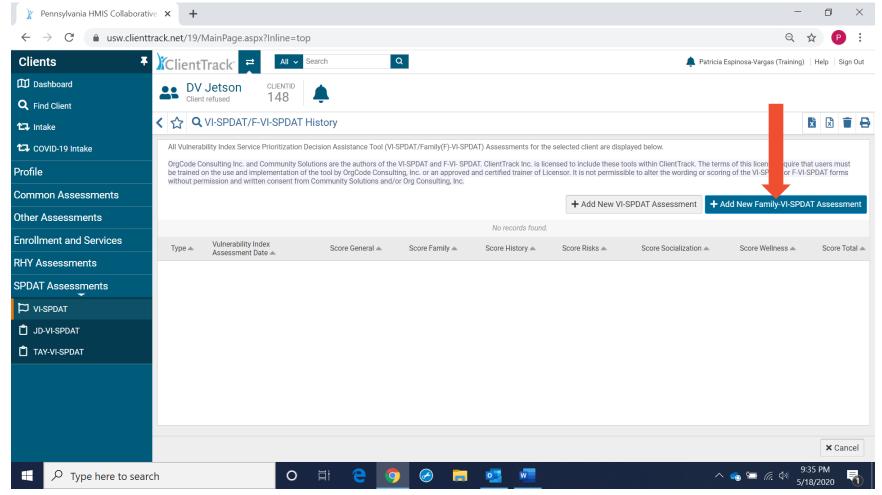


19. Choose to Add the appropriate VI-SPDAT if Single or Family (for this purpose we will select Family)

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COMPLETING A DV ANON ASSESSMENT





20. Read the following Script before fielding the VI-SPDAT: "I have a brief survey that I would like to complete with you. The answers will help us determine how we can best support you with available resources. Most questions only require a

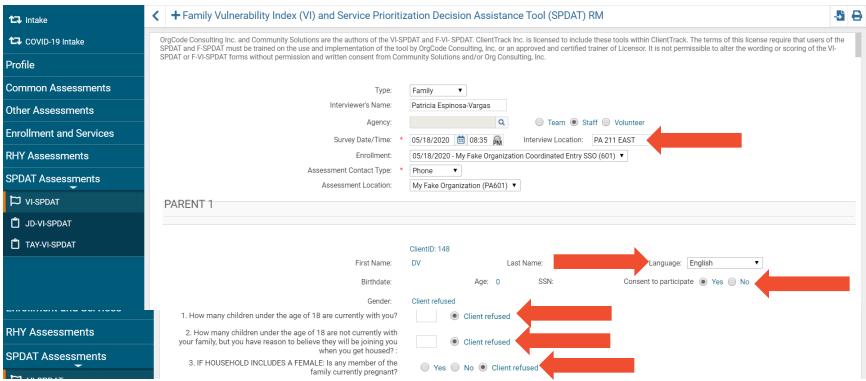
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COMPLETING A DV ANON ASSESSMENT



yes or a no, some questions required a one-word answer. I'll be honest, some questions are personal in nature, but know you can skip or refuse any question. The more honestly you answer these questions, the better we can figure out how to assist you. The information collected goes into the Eastern Pennsylvania secure data system. If you do not understand a question, let me know, I would be happy to clarify. If it seems to me that you don't understand a question, I will do my best to explain it to you with you needing to ask for clarification."

- a. Add that are Staff and add your Interview Location
- b. Add the Assessment Contact Type
- c. Choose the Client's Preferred Language
- d. Choose Yes to Consent to Participate
- e. If completing a Family VI-SPDAT, please mark Client Refused for questions 1, 2 and 3



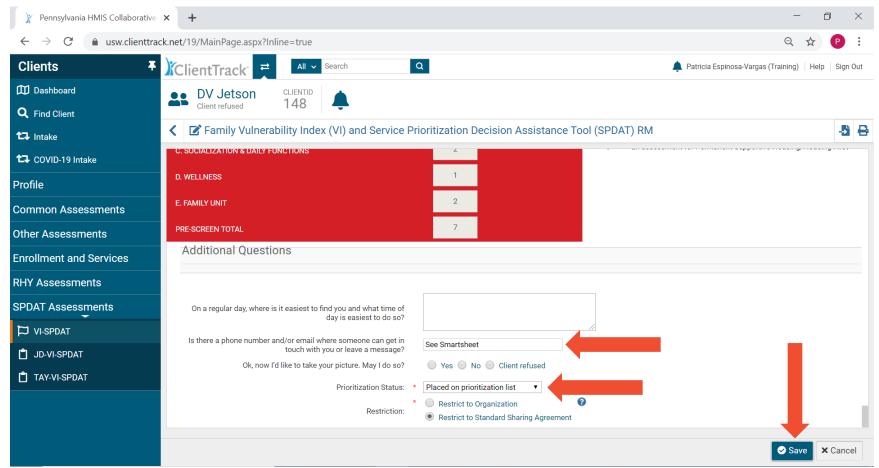
21. At the bottom of the SPDAT (Additional Questions) please choose/type the following:

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COMPLETING A DV ANON ASSESSMENT



- a. Is there a phone number and/or email someone can get in touch with you or leave a message?: See Smartsheet (if you did not already add the client's contact information to the Smartsheet, please do so now)
- b. Prioritization Status: Placed on prioritization list
 - Be sure to verify/ask what counties the client is interested in obtaining housing in (please attempt to narrow down the radius if the client replies "anywhere")...this you need to document in your Case Note
- c. Click Save when complete



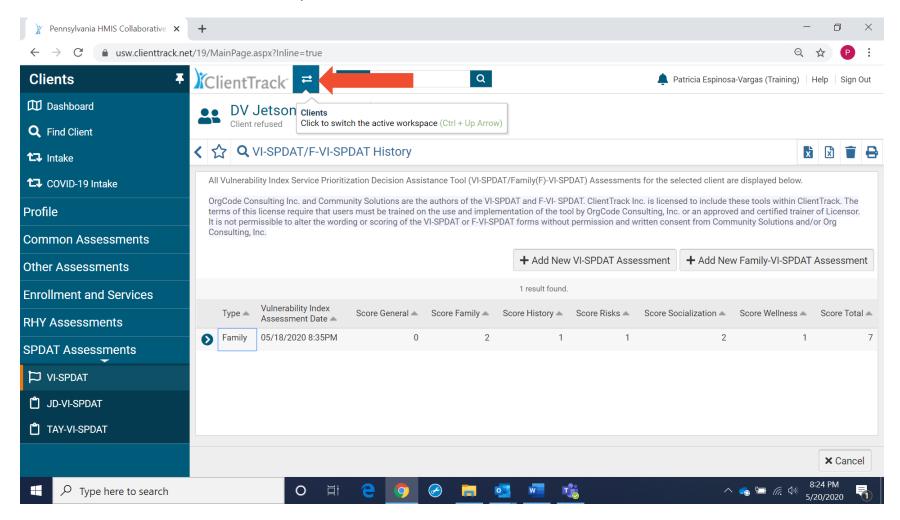
22. Please verify that the Client is now on the By Name List by doing the following:

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COMPLETING A DV ANON ASSESSMENT



a. Click the arrows to switch the workspace

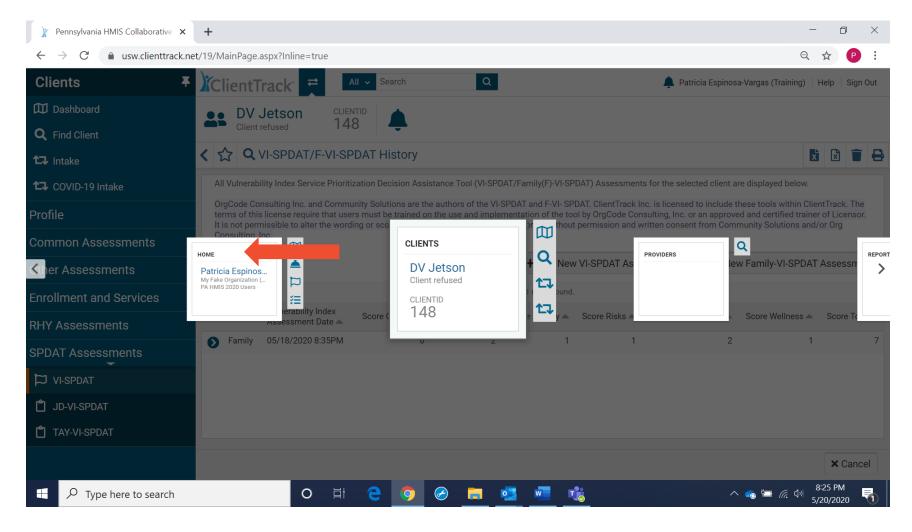


b. Click Home

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COMPLETING A DV ANON ASSESSMENT



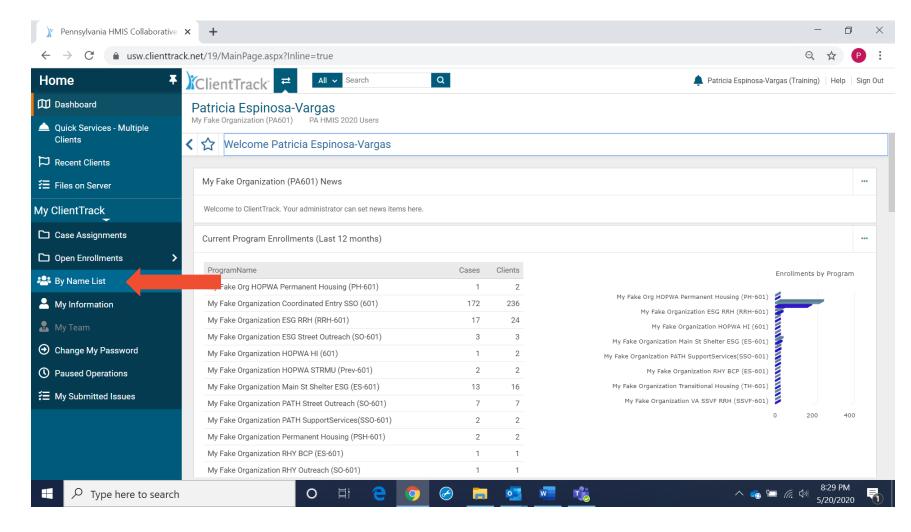


c. Click By Name List

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COMPLETING A DV ANON ASSESSMENT



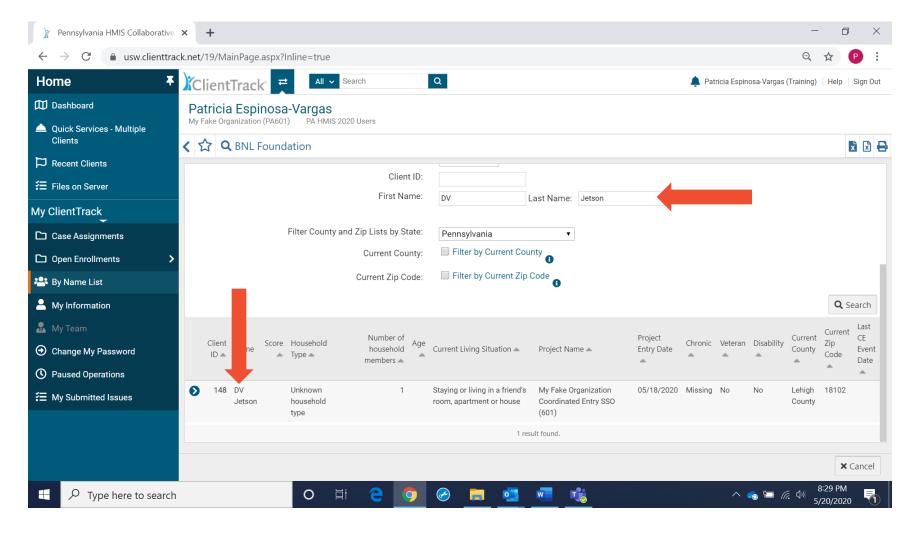


d. Search for your client on the By Name List

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COMPLETING A DV ANON ASSESSMENT



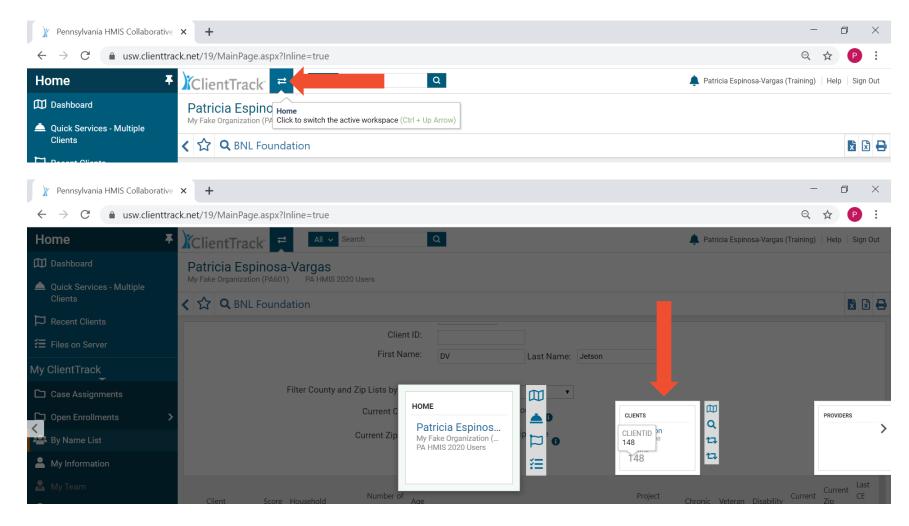


23. Return to the Client Workspace by clicking the arrows to switch back to your Client screen

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COMPLETING A DV ANON ASSESSMENT





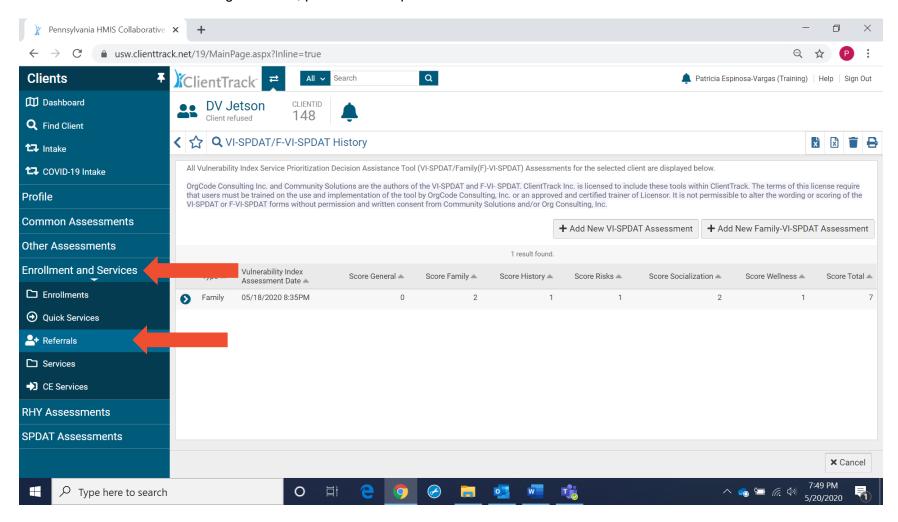
24. If making referrals for Shelter or Rental Assistance/Deposit, click Referrals under Enrollment and Services

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COMPLETING A DV ANON ASSESSMENT



a. If the client is not needing Referrals, proceed to Step 28



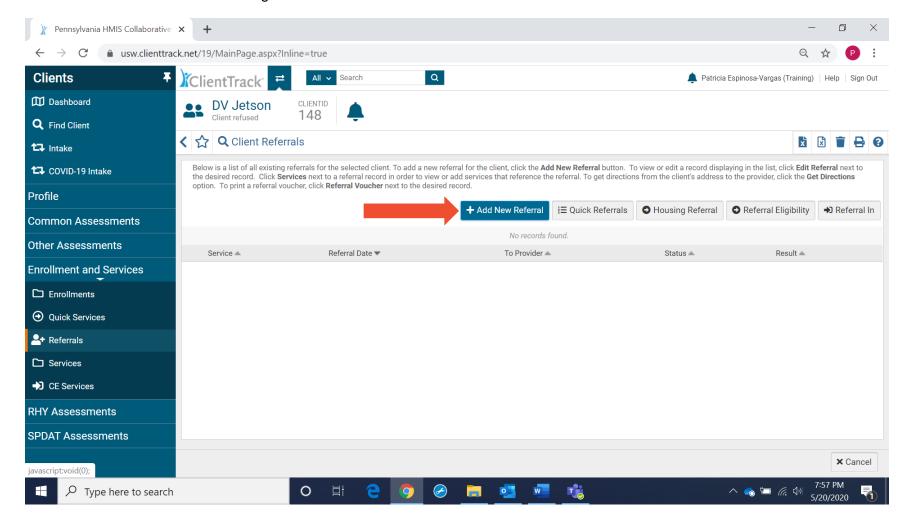
25. Click Add New Referral

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a. Be sure to ask the client the following: "May I ask what counties you are looking to be housed in?", in an attempt to reduce the counties the client is willing to relocate to their immediate area



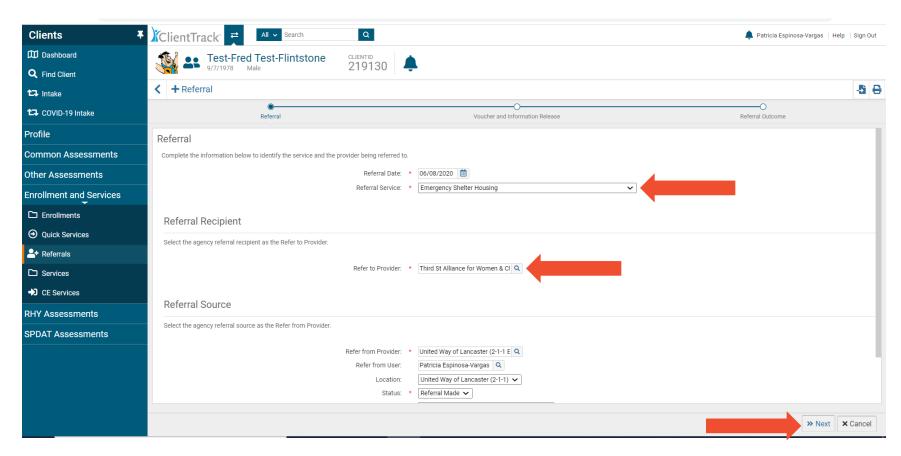
26. Please choose/click the following:

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COMPLETING A DV ANON ASSESSMENT



- a. Utilize the Matrix to first identify potential Emergency Shelter, Transitional Housing, Rental Assistance Providers, and to ensure the client meets any eligibility the Provider has listed
- b. Choose CE-Referral to **Emergency Shelter Housing** and/or **Transitional Housing (SHP)**, **or Rental Assistance** as the Referral Service to search for Providers that are coded on the Matrix as ES, TH, or Prevention/Rental Assistance
- c. Locate the Provider you are attempting to refer to (it is possible that a Provider may disallow referrals, if this is the case, the Provider will likely not appear in the referral list)
- d. All other fields may be skipped
- e. Click Next to move to the next screen

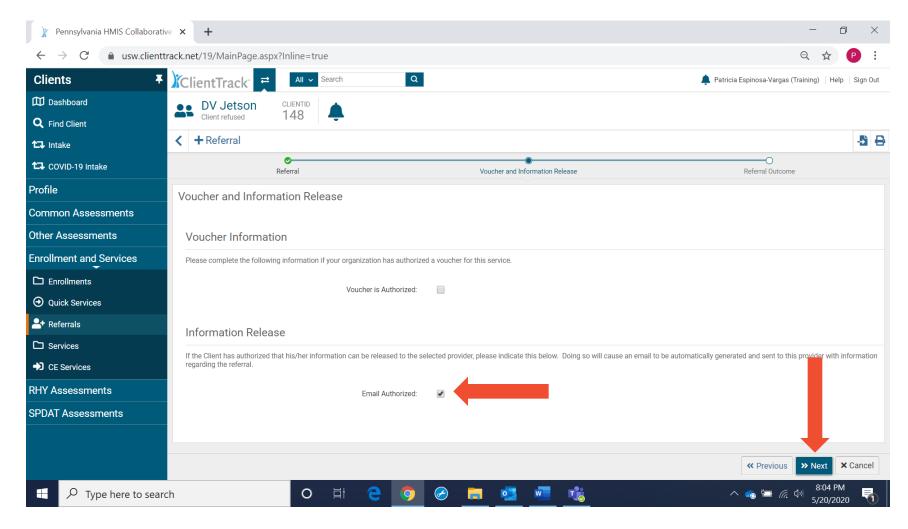


27. Click the checkbox for Email Authorized (please do not click the checkbox for Voucher Authorized), then click Next

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COMPLETING A DV ANON ASSESSMENT



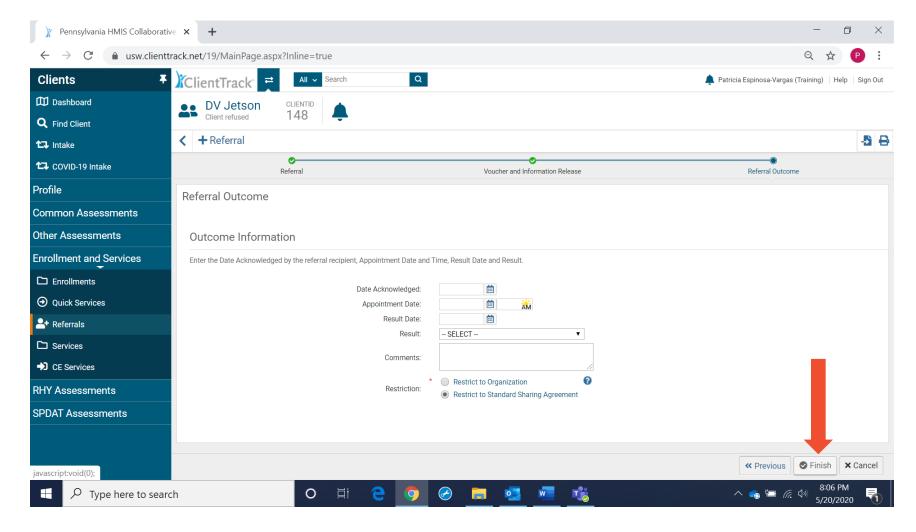


28. Skip all options under Outcome Information (as we do not know any outcome) and click Finish

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COMPLETING A DV ANON ASSESSMENT





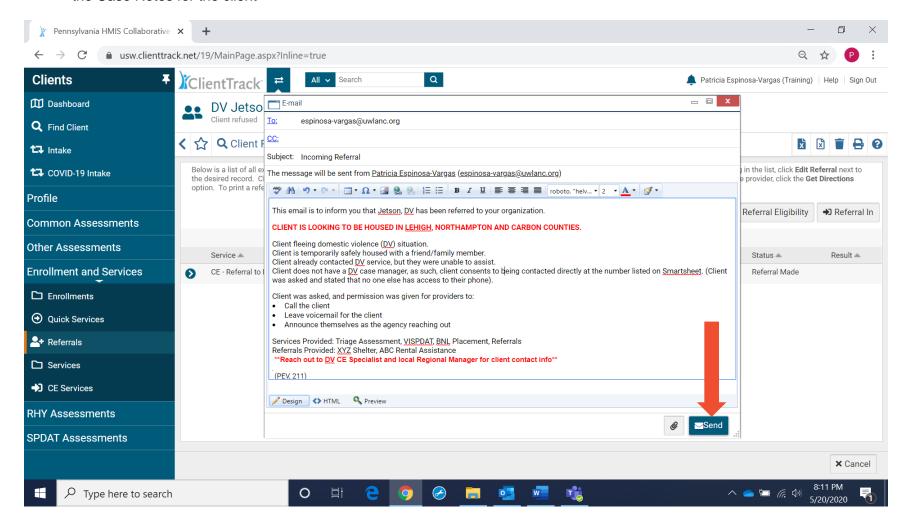
29. You will now need to create an email to send to the agency staff person listed on the Matrix as an alert of a referral

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COMPLETING A DV ANON ASSESSMENT



- a. Please use the Sample DV Anonymous Notes template to type a safe, non-identifying note
- b. Before you click Send, it is recommended that you COPY this note into your clipboard so that you may easily PASTE it in to the Case Notes for the client

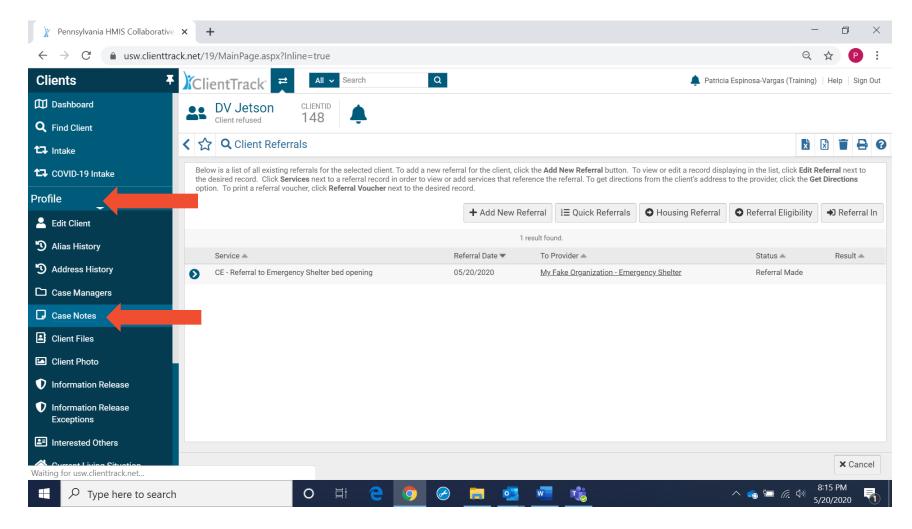


30. Click Profile, then Case Notes

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COMPLETING A DV ANON ASSESSMENT



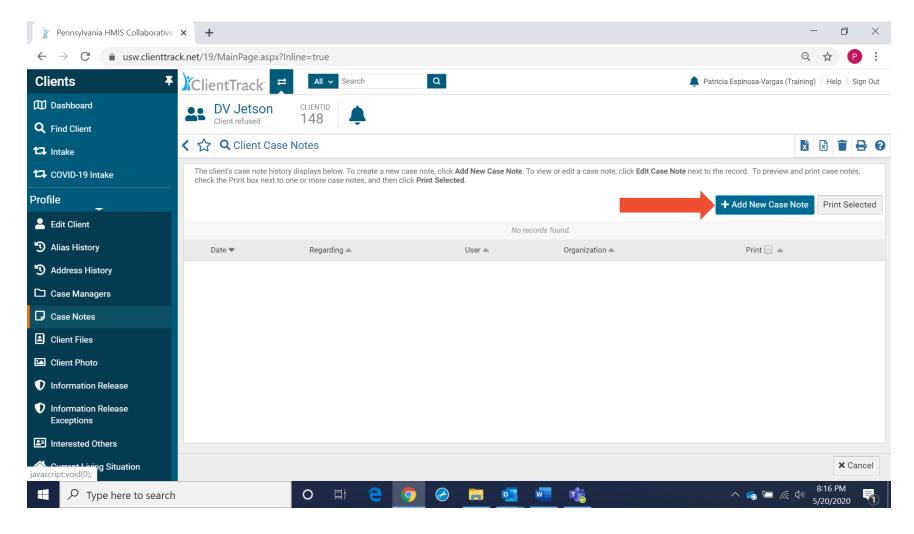


31. Click Add New Case Note

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COMPLETING A DV ANON ASSESSMENT





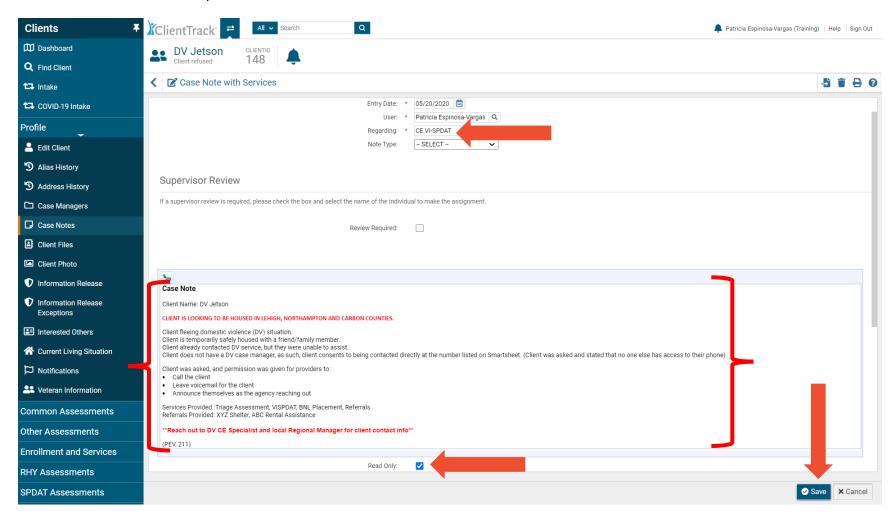
32. Please complete the following

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COMPLETING A DV ANON ASSESSMENT



- a. Click Add New Case Note
- b. Type your Case Note (or copy and paste from the note you entered in your email to a Referral Provider)
- c. Regarding: CE VI-SPDAT; or CE Prevention Referral; or CE Shelter Referral...please start the "Regarding" with CE
- d. Click Read Only: This will protect the Case Note from being edited by any other organization
- e. Click Save when complete, then click Cancel to return to the Dashboard



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COMPLETING A DV ANON ASSESSMENT



33. When ending the conversation with the Client, please read the following statement: "Thank you, this completes the screening process. We have referred you to the emergency shelter providers in your area who will be contacting you as resources become available (Intake Specialist may provide name of the shelter only). Your name and contact information have also been placed on a prioritized list for other housing services. If your housing situation changes in the meantime, please contact us or call 211 to provide an update. (Coordinated Entry Specialist must provide 211 as an alternative way to connect with CE).

211 Only: Please add the following to the above statement: *Often, people with housing concerns need help with food or appreciate information on employment services. I have that information too if you would like it.*"

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