

COORDINATED ENTRY TUTORIAL

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

The screenshot shows the ClientTrack web application interface. The browser address bar displays `usw.clienttrack.net/19/MainPage.aspx?Inline=true`. The user is logged in as Patricia Espinosa-Vargas (Training). The interface includes a sidebar with navigation options: Home, Dashboard, Quick Services - Multiple Clients, Recent Clients, Files on Server, My ClientTrack, Case Assignments, Open Enrollments, By Name List, My Information, My Team, Change My Password, and Paused Operations. The main content area displays the Home screen with a welcome message and a table of Current Program Enrollments (Last 12 months).

Home

ClientTrack

Patricia Espinosa-Vargas (Training) | Help | Sign Out

Welcome Patricia Espinosa-Vargas

My Fake Organization (PA601) News

Welcome to ClientTrack. Your administrator can set news items here.

Current Program Enrollments (Last 12 months)

| ProgramName | Cases | Clients |
|---|-------|---------|
| My Fake Org HOPWA Permanent Housing (PH-601) | 1 | 2 |
| My Fake Organization Coordinated Entry SSO (601) | 43 | 55 |
| My Fake Organization ESG RRH (RRH-601) | 13 | 19 |
| My Fake Organization ESG Street Outreach (SO-601) | 3 | 3 |
| My Fake Organization HOPWA HI (601) | 1 | 2 |
| My Fake Organization HOPWA STRMU (Prev-601) | 2 | 2 |

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

The screenshot shows the ClientTrack web application interface. The browser address bar displays `usw.clienttrack.net/19/MainPage.aspx?Inline=true`. The user is logged in as Patricia Espinosa-Vargas (Training). The left sidebar contains navigation options: Home, Dashboard, Quick Services - Multiple Clients, Recent Clients, Files on Server, My ClientTrack, Case Assignments, Open Enrollments, By Name List, My Information, My Team, Change My Password, and Paused Operations. The main content area shows a welcome message for Patricia Espinosa-Vargas and a table of Current Program Enrollments. A search bar is visible, and a search result for Patricia Espinosa-Vargas is displayed. A red arrow points to the search bar, indicating the next step in the tutorial.

| ProgramName | Is | Clients |
|---|----|---------|
| My Fake Org HOPWA Permanent | 1 | 2 |
| My Fake Organization Coordinated Entry SSO (601) | 43 | 55 |
| My Fake Organization ESG RRH (RRH-601) | 13 | 19 |
| My Fake Organization ESG Street Outreach (SO-601) | 3 | 3 |
| My Fake Organization HOPWA HI (601) | 1 | 2 |
| My Fake Organization HOPWA STRMU (Prev-601) | 2 | 2 |

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

The screenshot displays the ClientTrack web application. The browser window shows the URL `usw.clienttrack.net/19/MainPage.aspx?Inline=true`. The application interface includes a top navigation bar with the 'ClientTrack' logo, a search bar, and user information for Patricia Espinosa-Vargas (Training). The left sidebar contains a 'Clients' menu with options like Dashboard, Find Client (highlighted with a red arrow), Intake, COVID-19 Intake, Profile, Edit Client, Alias History, Address History, Case Managers, Case Notes, Client Files, Client Photo, and Information Release. The main content area shows the 'Strawberry Shortcake' client profile, including a placeholder for a photo and fields for Name, Birth Date, Gender, Ethnicity, and Race. Below the profile are sections for 'Strawberry's Enrollments' and 'Strawberry's Services', each showing a table with 1 result found.

| Enrollment Description | Active Household | Household | Project Start Date | Project Exit | Days | Exit Destination | Last Accessed |
|------------------------|------------------|-----------|--------------------|--------------|------|------------------|---------------|
| 1 result found. | | | | | | | |

| Date | Service |
|-----------------|---------|
| 1 result found. | |

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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)

Clients ClientTrack All Search

Patricia Espinosa-Vargas (Training) Help Sign Out

Fred Flintstone CLIENTID 62

9/30/1960 Male

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name: DV

Last Name: Jetson

Middle Name:

Full Name (Last, First):

Social Security Number:

Birth Date:

Scan Client ID:

Search

Cancel

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6. Assuming no results were found, Click Intake

usw.clienttrack.net/19/MainPage.aspx?Inline=top

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ClientTrack All Search

Fred Flintstone CLIENTID 62 9/30/1960 Male

Find Client

Intake

COVID-19 Intake

Profile

- Edit Client
- Alias History
- Address History
- Case Managers
- Case Notes
- Client Files
- Client Photo
- Information Release
- Information Release Exceptions

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name: DV

Last Name: Jetson

Middle Name:

Full Name (Last, First):

Social Security Number:

Birth Date:

Scan Client ID:

Search

No records found.

| First Name ▲ | Last Name ▲ | Middle Name ▲ | SSN ▲ | Birth Date ▲ |
|--------------|-------------|---------------|-------|--------------|
|--------------|-------------|---------------|-------|--------------|

Cancel

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7. Click Add New Client

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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

usw.clienttrack.net/19/MainPage.aspx?Inline=top

ClientTrack

Patricia Espinosa-Vargas (Training) | Help | Sign Out

DV Jetson

Intake (2298)

Basic Client Information

Family Members

Program Enrollment

Client Information

Search Existing Clients

Basic Client Information

Search Existing Clients

The first step in adding a new client is to search existing client records for possible matches to avoid duplicate entry. Enter partial identifying information on the client, and then click Next to search from existing client records.

- If the system finds no potential matches, you will be taken directly to Step 2.
- If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing client record by clicking on that row.
- If there are no accurate matches, click Next again to continue to Step 2 in adding a new client record.

First Name: DV

Last Name: Jetson

Social Security Number: [] [] [] [] [] []

Birth Date: [] [] [] [] [] [] [] []

ClientID: [] [] [] [] [] [] [] []

Next

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9. Complete the following as indicated:

- Name Quality: Partial or Code Name
- SSN Quality: Client Refused
- Date of Birth Quality: Client Refused
- Race/Ethnicity: Client Refused
- Gender: Client Refused
- 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?”

The screenshot shows the 'DV Jetson' client information form. The left sidebar contains navigation links: Dashboard, Find Client, Intake, COVID-19 Intake, Profile (with a dropdown), Edit Client, Alias History, Address History, Case Managers, Case Notes, Client Files, Client Photo, Information Release, Information Release Exceptions, Interested Others, Current Living Situation, Notifications, and Veteran Information. Below these are sections for Common Assessments, Other Assessments, and Enrollment and Services.

The main form area is titled 'Client Information' and includes the following fields and annotations:

- Name Quality:** A dropdown menu showing 'Partial, street name, or code name reported'. A red arrow labeled **9a** points to this field.
- SSN Quality:** Radio buttons for 'Client doesn't know', 'Client Refused' (selected), and 'Data not collected'. A red arrow labeled **9b** points to the 'Client Refused' option.
- Date of Birth Quality:** Radio buttons for 'Full DOB Reported', 'Approximate or Partial DOB Reported', 'Client doesn't know', 'Client refused' (selected), and 'Data not collected'. A red arrow labeled **9c** points to the 'Client refused' option.
- Ethnicity:** A dropdown menu showing 'Client refused'. A red arrow labeled **9d** points to this field.
- Race:** A dropdown menu with options: 'Black or African American', 'Native Hawaiian or Other Pacific Islander', 'White', 'Client doesn't know', 'Client refused' (selected), and 'Data not collected'. A red arrow labeled **9d** points to this field.
- Gender:** A dropdown menu showing 'Client refused'. A red arrow labeled **9e** points to this field.
- Veteran Status:** A dropdown menu showing 'No'. A red arrow labeled **9f** points to this field.

At the bottom of the form, there is a checkbox for 'Show Address and Contact Information:' which is currently unchecked.

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

usw.clienttrack.net/19/MainPage.aspx?Inline=top

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Clients

- Dashboard
- Find Client
- Intake
- COVID-19 Intake
- Profile
 - Edit Client
 - Alias History
 - Address History
 - Case Managers
 - Case Notes
 - Client Files
 - Client Photo
 - Information Release
 - Information Release Exceptions
 - Interested Others
 - Current Living Situation

ClientTrack All Search

DV Jetson

< ☆ Client Information

Show Address and Contact Information: ☒ ⓘ

Contact Information

Address:

Address 2:

City, State, Zip Code: City State Zip Code

Email:

☐ Email Safe to Contact

Home Phone:

☐ Home Phone Safe to Contact

Work Phone:

☐ Work Phone Safe to Contact

Msg Phone:

☐ Msg Phone Safe to Contact

Safe Contact Information:

Finish Cancel

Type here to search

7:11 PM 5/20/2020

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- 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

Clients ClientTrack All Search Patricia Espinosa-Vargas (Training) Help Sign Out

DV Jetson

< ☆ Client Information

Safe Contact Information: See [Smartsheet](#)

Family Information

Use this section to collect data about a client's family. The Family search field allows you to search for and select an existing family account. This is appropriate when adding a family member to an existing family.

Family: Jetson, DV Household ⓘ

Relationship to Head of Household: * Self

Information Release

- Use this section to collect data about a client's information release.

Information Release #: * 1 - Allow Sharing ←

Begin Date: 05/18/2020

End Date:

Finish Cancel

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10. Open Smartsheet to enter the client's contact information (<https://app.smartsheet.com/b/home>)
- 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)

← → ↻ app.smartsheet.com/b/home?lang=en_US 🔑 ☆ P ⋮

smartsheet

Welcome back. Log in here.

[Forgot password?](#)

Log In

☐ Keep me logged in

Or log in with

Google

Microsoft

Apple

| | | | | Date added | HMIS number (client ID) | Password | Phone number | Type of phone number | Safe to call | Safe to leave Voicemail | Safe to identify Provider | Client initials | Consent to Release signed | Date of Release |
|--|--|--|--|------------|-------------------------|-----------|--------------|----------------------|--------------|-------------------------|---------------------------|-----------------|---------------------------|-----------------|
| | | | | 5/18/2020 | 148 | DV Jetson | 717-111-1111 | consumers phone | yes | yes | yes | J.J. | new enrollment | N/A |

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

usw.clienttrack.net/19/MainPage.aspx?Inline=top

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Clients

- Dashboard
- Find Client
- Intake
- COVID-19 Intake
- Profile
 - Edit Client
 - Alias History
 - Address History
 - Case Managers
 - Case Notes
 - Client Files
 - Client Photo
 - Information Release
 - Information Release Exceptions
 - Interested Others
 - Current Living Situation
 - Notifications
 - Veteran Information
- Common Assessments

ClientTrack All Search

DV Jetson CLIENTID 148

Intake (2298)

- Basic Client Information
- Family Members
- Program Enrollment

Family Members

The selected client's family members are displayed below. You may search for existing clients to add to this family or add new clients to the database and associate them with this family.

It's important to note that family members are the people who the client is related to. Family isn't always the same as a client's household. According to HUD "[a] household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)." (Data Manual)

This workflow will allow you to enroll all family members or select which family members you want to enroll.

1 result found (+1).

| | First Name | Middle Name | Last Name | Suffix | Name Quality | Birth Date | Age | Birth Date Quality | Gender | SSN | SSN Quality |
|-------------------------------------|------------|-------------|-----------|--------|--------------------|------------|-----|--------------------|----------------|-----|----------------|
| <input checked="" type="checkbox"/> | DV | | Jetson | | Full name reported | | N/A | Client refused | Client refused | | Client Refused |
| <input type="checkbox"/> | | | | | --SELECT-- | | N/A | --SELECT-- | --SELECT-- | | --SELECT-- |

Save **Save & Close**

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

211 Team - Home x Pennsylvania HMIS Collaborative x +

usw.clienttrack.net/19/MainPage.aspx?Inline=top

ClientTrack All Search

Patricia Espinosa-Vargas | Help | Sign Out

Clients

- Dashboard
- Find Client
- Intake**
- COVID-19 Intake
- Profile
- Common Assessments
- Other Assessments
- Enrollment and Services
- RHY Assessments
- SPDAT Assessments
- VI-SPDAT
- JD-VI-SPDAT
- TAY-VI-SPDAT

DV-Test-Pebbles DV-Test-Flintstone CLIENTID 219135

Client refused

+ HUD Program Enrollment

Intake (2298)

- Basic Client Information
- Family Members
- Program Enrollment

Tracking method will have a project start date and will allow clients to re-enter as necessary without exiting and reapplying for each stay for a specified period.

- For **Safe Havens and Transitional Housing** – it is the date the client moves into the residential project (i.e. first night in residence).
- For all types of **Permanent Housing**, including **Rapid Re-Housing** – it is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
 1. Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify – though all documentation may not yet have been gathered)
 2. The client has indicated they want to be housed in this project
 3. The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time
- For all other types of Service projects including but not limited to: services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project: * **United Way of Lan. (PA East 2-1-1) CE Screenings**

– SELECT –
Coordinated Entry
United Way of Lan. (PA East 2-1-1) CE Screenings

Household

Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

| | Name | Gender | Age | Project Start Date | Exit Date | Case Manager | Relationship to Head of Household* |
|-------------------------------------|-------------------------------------|----------------|-----|--------------------|-----------|--------------------------|------------------------------------|
| <input checked="" type="checkbox"/> | DV-Test-Flintstone, DV-Test-Pebbles | Client refused | | 05/22/2020 | | Patricia Espinosa-Vargas | Self |

1

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

The screenshot displays the ClientTrack interface for a Universal Data Assessment. The left sidebar shows navigation options like Dashboard, Find Client, Intake, and various assessment types. The main content area shows the assessment form for client DV-Test-Pebbles DV-Test-Flintstone (Client ID 219135). The form includes the following fields:

- Assessment Date: 05/22/2020
- Age at Assessment: 0
- Assessment Type: Entry
- Assessor: Patricia Espinosa-Vargas
- Program: United Way of Lan. (PA East 2-1-1) CE Screenings
- Disabling Condition: Client refused (indicated by red arrow 13a)
- Client Location: PA-509 - Eastern Pennsylvania CoC (indicated by red arrow 13b)
- Living Situation: Rental by client, no ongoing housing subsidy
- Did you stay less than 7 nights?: No
- Length of stay in the prior living situation: One year or longer

The bottom of the screen shows the Windows taskbar with the search bar and various application icons. The system clock indicates 9:14 AM on 5/22/2020.

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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 before 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

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



Intake (2298)

Universal Data Assessment

Living Situation

Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.

Prior Living Situation: * Rental by client, no ongoing housing subsidy **13c**

Did you stay less than 7 nights? * No

Length of stay in the prior living situation: * One year or longer

Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Covered by Health Insurance: * Client refused **13d**

Default Last Insurance Status

| Type | Status | Reason No | Other Coverage |
|------------------------------|--------|------------|----------------|
| Private Pay Health Insurance | No | - SELECT - | |

13e

Save

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
- Assessment Contact Type: For 211, the response should always be Phone, For Access Sites it will likely be In-Person
 - Current Living Situation: Where the client slept last night (please do not enter anything into Location Detail)
 - Special Intervention Likely Needed: It is helpful to note if the client was provided with or agreed to call a DV Hotline (or refused)
 - Prioritization Status: Not placed on prioritization list
 - Click Save when complete

13b

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COMPLETING A DV ANON ASSESSMENT



Intake (2298)

Assessment Active

Assessment Date: * 05/22/2020
Assessment Location: * United Way of Lancaster (2-1-1)
Assessment Contact Type: * Phone
What is your household type: * Household with children and adults
Information Date: * 05/22/2020
Enrollment: * 05/22/2020 - United Way of Lan. (PA East 2-1-1) CE Screenings
Verified by Project: * - SELECT -

Current Living Situation Information

Current Living Situation: * Staying or living in a friend's room, apartment or house
Is client going to have to leave their current living situation within 14 days: * Yes
Has a subsequent residence been identified: * No
Does individual or family have resources or support networks to obtain other permanent housing: * No
Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days: * Yes
Has the client moved 2 or more times in the last 60 days: * No
Location Detail:
Record Contact:
County or Zip code where you slept last night if known: Pennsylvania Northampton County 18042
Unknown County or Zip
Is there violence or conflict in the place you were staying last night: * Yes
Is your health or safety at risk in the place you were staying last night: * Yes
Do you have another place to go: * No
Special intervention likely needed. If DV, may not be able to use HMIS: Warm transferred offered
Prioritization Status: * Not placed on prioritization list

Save

15. Click No for a Housing Needs Assessment

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A screenshot of a web browser displaying the ClientTrack application. The browser's address bar shows 'usw.clienttrack.net/19/MainPage.aspx?Inline=top'. The application has a dark blue sidebar on the left with a 'Clients' header and a search bar. The sidebar menu includes 'Dashboard', 'Find Client', 'Intake', 'COVID-19 Intake', 'Profile', 'Edit Client', 'Alias History', 'Address History', 'Case Managers', 'Case Notes', 'Client Files', 'Client Photo', 'Information Release', 'Information Release Exceptions', 'Interested Others', 'Current Living Situation', 'Notifications', and 'Unknown Information'. The main content area shows the client profile for 'DV Jetson' (Client ID 148, status 'Client refused'). A list of intake steps is shown on the left, with 'Complete Housing Needs Assessment?' selected. The main form area displays the question 'Complete Housing Needs Assessment?' with two radio button options: 'Yes' and 'No'. A large red arrow points to the 'No' option. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 9:29 PM on 5/18/2020.

16. Click Enrollment and Services
 - a. Click CE Services

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

211 Team - Home x Pennsylvania HMIS Collaborative x Post Attendee - Zoom x +

usw.clienttrack.net/19/MainPage.aspx?Inline=true

ClientTrack All Search

Patricia Espinosa-Vargas Help Sign Out

Clients

- Dashboard
- Find Client
- Intake
- COVID-19 Intake
- Profile
- Common Assessments
- Other Assessments
- Enrollment and Services
 - Enrollments
 - Quick Services
 - Referrals
 - Services
 - CE Services
- RHY Assessments
- SPDAT Assessments

Intake (2298)

- Basic Client Information
- Family Members
- Program Enrollment
- DV-Test-Pebbles DV-Test-Flintstone

DV-Test-Pebbles DV-Test-Flintstone CLIENTID 219135

+ Coordinated Entry Event

Coordinated Entry Event Data Collection

Date of Event: 05/22/2020

Event Type: Problem Solving/Diversion/Rapid Resolution intervention or service

Provider: United Way of Lancaster

Enrollment: -- SELECT --

Problem Solving/Diversion/Rapid Resolution intervention or service result - Client housed/re-housed in a safe alternative: No

Referral Email Authorized: ☐

Restriction: ☐ Do Not Share Transaction ☒ Share Transaction

Save Cancel

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

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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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usw.clienttrack.net/19/MainPage.aspx?Inline=top

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Clients

- Dashboard
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- SPDAT Assessments
 - VI-SPDAT
 - JD-VI-SPDAT
 - TAY-VI-SPDAT

ClientTrack All Search

DV Jetson CLIENTID 148

Client refused

VI-SPDAT/F-VI-SPDAT History

All Vulnerability Index Service Prioritization Decision Assistance Tool (VI-SPDAT/Family(F)-VI-SPDAT) Assessments for the selected client are displayed below.

OrgCode Consulting Inc. and Community Solutions are the authors of the VI-SPDAT and F-VI-SPDAT. ClientTrack Inc. is licensed to include these tools within ClientTrack. The terms of this license require that users must be trained on the use and implementation of the tool by OrgCode Consulting, Inc. or an approved and certified trainer of Licensor. It is not permissible to alter the wording or scoring of the VI-SPDAT or F-VI-SPDAT forms without permission and written consent from Community Solutions and/or Org Consulting, Inc.

+ Add New VI-SPDAT Assessment + Add New Family-VI-SPDAT Assessment

No records found.

| Type | Vulnerability Index Assessment Date | Score General | Score Family | Score History | Score Risks | Score Socialization | Score Wellness | Score Total |
|------|-------------------------------------|---------------|--------------|---------------|-------------|---------------------|----------------|-------------|
|------|-------------------------------------|---------------|--------------|---------------|-------------|---------------------|----------------|-------------|

Cancel

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."

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

Intake
COVID-19 Intake
Profile
Common Assessments
Other Assessments
Enrollment and Services
RHY Assessments
SPDAT Assessments
VI-SPDAT
JD-VI-SPDAT
TAY-VI-SPDAT
RHY Assessments
SPDAT Assessments

+ Family Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT) RM

OrgCode Consulting Inc. and Community Solutions are the authors of the VI-SPDAT and F-VI-SPDAT. ClientTrack Inc. is licensed to include these tools within ClientTrack. The terms of this license require that users of the SPDAT and F-SPDAT must be trained on the use and implementation of the tool by OrgCode Consulting, Inc. or an approved and certified trainer of Licensor. It is not permissible to alter the wording or scoring of the VI-SPDAT or F-VI-SPDAT forms without permission and written consent from Community Solutions and/or Org Consulting, Inc.

Type: Family
Interviewer's Name: Patricia Espinosa-Vargas
Agency: Team ☒ Staff ☐ Volunteer
Survey Date/Time: 05/18/2020 08:35 PM Interview Location: PA 211 EAST
Enrollment: 05/18/2020 - My Fake Organization Coordinated Entry SSO (601)
Assessment Contact Type: Phone
Assessment Location: My Fake Organization (PA601)

PARENT 1

ClientID: 148
First Name: DV Last Name: Language: English
Birthdate: Age: 0 SSN: Consent to participate: ☒ Yes ☐ No
Gender: Client refused

1. How many children under the age of 18 are currently with you? ☒ Client refused
2. How many children under the age of 18 are not currently with your family, but you have reason to believe they will be joining you when you get housed? : ☒ Client refused
3. IF HOUSEHOLD INCLUDES A FEMALE: Is any member of the family currently pregnant? ☐ Yes ☐ No ☒ Client refused

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

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



- 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)
- 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
- Click Save when complete

Clients

Dashboard

Find Client

Intake

COVID-19 Intake

Profile

Common Assessments

Other Assessments

Enrollment and Services

RHY Assessments

SPDAT Assessments

VI-SPDAT

JD-VI-SPDAT

TAY-VI-SPDAT

ClientTrack

All Search

Patricia Espinosa-Vargas (Training) Help Sign Out

DV Jetson
Client refused
CLIENTID 148

Family Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT) RM

C. SOCIALIZATION & DAILY FUNCTIONS

D. WELLNESS

E. FAMILY UNIT

PRE-SCREEN TOTAL

Additional Questions

On a regular day, where is it easiest to find you and what time of day is easiest to do so?

Is there a phone number and/or email where someone can get in touch with you or leave a message?

See Smartsheet

Ok, now I'd like to take your picture. May I do so?

Prioritization Status: * Placed on prioritization list

Restriction: * Restrict to Organization Restrict to Standard Sharing Agreement

Save Cancel

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

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



a. Click the arrows to switch the workspace

b. Click Home

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



usw.clienttrack.net/19/MainPage.aspx?Inline=true

Patricia Espinosa-Vargas (Training) | Help | Sign Out

Clients

Dashboard
Find Client
Intake
COVID-19 Intake

Profile

Common Assessments

Other Assessments

Enrollment and Services

RHY Assessments

SPDAT Assessments

VI-SPDAT
JD-VI-SPDAT
TAY-VI-SPDAT

ClientTrack All Search

DV Jetson CLIENTID 148

Client refused

VI-SPDAT/F-VI-SPDAT History

All Vulnerability Index Service Prioritization Decision Assistance Tool (VI-SPDAT/Family(F)-VI-SPDAT) Assessments for the selected client are displayed below.

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CLIENTS

DV Jetson
Client refused
CLIENTID 148

PROVIDERS

REPORT

HOME
Patricia Espinos...
My Fake Organization (...
PA HMIS 2020 Users

Family 05/18/2020 8:35PM

Score C

Score Risks

Score Wellness

Score T

Cancel

Type here to search

8:25 PM
5/20/2020

c. Click By Name List

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



usw.clienttrack.net/19/MainPage.aspx?Inline=true

Home ClientTrack All Search

Patricia Espinosa-Vargas (Training) Help Sign Out

Dashboard

Quick Services - Multiple Clients

Recent Clients

Files on Server

My ClientTrack

Case Assignments

Open Enrollments

By Name List

My Information

My Team

Change My Password

Paused Operations

My Submitted Issues

Patricia Espinosa-Vargas
My Fake Organization (PA601) PA HMIS 2020 Users

Welcome Patricia Espinosa-Vargas

My Fake Organization (PA601) News

Welcome to ClientTrack. Your administrator can set news items here.

Current Program Enrollments (Last 12 months)

| ProgramName | Cases | Clients |
|--|-------|---------|
| My Fake Org HOPWA Permanent Housing (PH-601) | 1 | 2 |
| My Fake Organization Coordinated Entry SSO (601) | 172 | 236 |
| My Fake Organization ESG RRH (RRH-601) | 17 | 24 |
| My Fake Organization ESG Street Outreach (SO-601) | 3 | 3 |
| My Fake Organization HOPWA HI (601) | 1 | 2 |
| My Fake Organization HOPWA STRMU (Prev-601) | 2 | 2 |
| My Fake Organization Main St Shelter ESG (ES-601) | 13 | 16 |
| My Fake Organization PATH Street Outreach (SO-601) | 7 | 7 |
| My Fake Organization PATH SupportServices(SSO-601) | 2 | 2 |
| My Fake Organization Permanent Housing (PSH-601) | 2 | 2 |
| My Fake Organization RHY BCP (ES-601) | 1 | 1 |
| My Fake Organization RHY Outreach (SO-601) | 1 | 1 |

Enrollments by Program

d. Search for your client on the By Name List

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COMPLETING A DV ANON ASSESSMENT



usw.clienttrack.net/19/MainPage.aspx?Inline=true

Home ClientTrack Patricia Espinosa-Vargas (Training) Help Sign Out

Patricia Espinosa-Vargas
My Fake Organization (PA601) PA HMIS 2020 Users

BNL Foundation

Client ID: First Name: DV Last Name: Jetson

Filter County and Zip Lists by State: Pennsylvania

Current County: ☐ Filter by Current County

Current Zip Code: ☐ Filter by Current Zip Code

| Client ID | First Name | Score | Household Type | Number of household members | Age | Current Living Situation | Project Name | Project Entry Date | Chronic | Veteran | Disability | Current County | Current Zip Code | Last CE Event Date |
|-----------|------------|-------|------------------------|-----------------------------|-----|--|--|--------------------|---------|---------|------------|----------------|------------------|--------------------|
| 148 | DV Jetson | | Unknown household type | 1 | | Staying or living in a friend's room, apartment or house | My Fake Organization Coordinated Entry SSO (601) | 05/18/2020 | Missing | No | No | Lehigh County | 18102 | |

1 result found.

Type here to search

8:29 PM 5/20/2020

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

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



The top screenshot shows the ClientTrack login page. The URL is `usw.clienttrack.net/19/MainPage.aspx?Inline=true`. The user is logged in as Patricia Espinosa-Vargas (Training). A red arrow points to the 'Home' button in the top navigation bar.

The bottom screenshot shows the main dashboard. The user is logged in as Patricia Espinosa-Vargas (Training). The dashboard displays a search bar, a list of clients, and a sidebar with various navigation options. A red arrow points to the 'CLIENTS' tab in the left sidebar. A tooltip for the 'HOME' button is also visible.

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

usw.clienttrack.net/19/MainPage.aspx?Inline=true

Patricia Espinosa-Vargas (Training) | Help | Sign Out

Clients

- Dashboard
- Find Client
- Intake
- COVID-19 Intake
- Profile
- Common Assessments
- Other Assessments
- Enrollment and Services**
- Enrollments
- Quick Services
- Referrals**
- Services
- CE Services
- RHY Assessments
- SPDAT Assessments

ClientTrack All Search

DV Jetson CLIENTID 148 Client refused

VI-SPDAT/F-VI-SPDAT History

All Vulnerability Index Service Prioritization Decision Assistance Tool (VI-SPDAT/Family(F)-VI-SPDAT) Assessments for the selected client are displayed below.

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+ Add New VI-SPDAT Assessment + Add New Family-VI-SPDAT Assessment

1 result found.

| Type | Vulnerability Index Assessment Date | Score General | Score Family | Score History | Score Risks | Score Socialization | Score Wellness | Score Total |
|--------|-------------------------------------|---------------|--------------|---------------|-------------|---------------------|----------------|-------------|
| Family | 05/18/2020 8:35PM | 0 | 2 | 1 | 1 | 2 | 1 | 7 |

Cancel

25. Click Add New Referral

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



- 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

The screenshot shows the ClientTrack web application interface. The left sidebar contains navigation links: Clients, Dashboard, Find Client, Intake, COVID-19 Intake, Profile, Common Assessments, Other Assessments, Enrollment and Services, Referrals, Services, CE Services, RHY Assessments, and SPDAT Assessments. The main content area displays the 'Client Referrals' page for client DV Jetson (Client refused, CLIENTID 148). A red arrow points to the '+ Add New Referral' button. Below the button are several tabs: Quick Referrals, Housing Referral, Referral Eligibility, and Referral In. The table below shows 'No records found.' with columns for Service, Referral Date, To Provider, Status, and Result. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

26. Please choose/click the following:

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



- 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
- 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
- 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)
- All other fields may be skipped
- Click Next to move to the next screen

Clients | ClientTrack | All | Search | Patricia Espinosa-Vargas | Help | Sign Out

Test-Fred Test-Flintstone | CLIENTID 219130 | 9/7/1978 | Male

+ Referral

Referral

Complete the information below to identify the service and the provider being referred to.

Referral Date: * 06/08/2020

Referral Service: * Emergency Shelter Housing

Referral Recipient

Select the agency referral recipient as the Refer to Provider.

Refer to Provider: * Third St Alliance for Women & Cl

Referral Source

Select the agency referral source as the Refer from Provider.

Refer from Provider: * United Way of Lancaster (2-1-1 E)

Refer from User: Patricia Espinosa-Vargas

Location: United Way of Lancaster (2-1-1)

Status: * Referral Made

>> Next **✕ Cancel**

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

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



usw.clienttrack.net/19/MainPage.aspx?Inline=true

Patricia Espinosa-Vargas (Training) | Help | Sign Out

Clients

- Dashboard
- Find Client
- Intake
- COVID-19 Intake
- Profile
- Common Assessments
- Other Assessments
- Enrollment and Services
 - Enrollments
 - Quick Services
 - Referrals**
 - Services
 - CE Services
- RHY Assessments
- SPDAT Assessments

ClientTrack All Search

DV Jetson
Client refused
CLIENTID 148

+ Referral

Referral Voucher and Information Release Referral Outcome

Voucher and Information Release

Voucher Information

Please complete the following information if your organization has authorized a voucher for this service.

Voucher is Authorized: ☐

Information Release

If the Client has authorized that his/her information can be released to the selected provider, please indicate this below. Doing so will cause an email to be automatically generated and sent to this provider with information regarding the referral.

Email Authorized: ☒

<< Previous >> Next X Cancel

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

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



usw.clienttrack.net/19/MainPage.aspx?Inline=true

Patricia Espinosa-Vargas (Training) | Help | Sign Out

Clients

- Dashboard
- Find Client
- Intake
- COVID-19 Intake
- Profile
- Common Assessments
- Other Assessments
- Enrollment and Services
 - Enrollments
 - Quick Services
 - Referrals**
 - Services
 - CE Services
- RHY Assessments
- SPDAT Assessments

ClientTrack All Search

DV Jetson
Client refused
CLIENTID 148

+ Referral

Referral Voucher and Information Release Referral Outcome

Referral Outcome

Outcome Information

Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

Date Acknowledged:

Appointment Date: AM

Result Date:

Result: -- SELECT --

Comments:

Restriction: ☐ Restrict to Organization ☒ Restrict to Standard Sharing Agreement

javascript:void(0);

<< Previous **Finish** X Cancel

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

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



- Please use the Sample DV Anonymous Notes template to type a safe, non-identifying note
- 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

Below is a list of all ex the desired record. Cl option. To print a refe

The message will be sent from Patricia Espinosa-Vargas (espinosa-vargas@uwlanc.org)

This email is to inform you that Jetson, DV has been referred to your organization.

CLIENT IS LOOKING TO BE HOUSED IN LEHIGH, NORTHAMPTON AND CARBON COUNTIES.

Client fleeing domestic violence (DV) situation.
Client is temporarily safely housed with a friend/family member.
Client already contacted DV service, but they were unable to assist.
Client does not have a DV case manager, as such, client consents to being contacted directly at the number listed on Smartsheet. (Client was asked and stated that no one else has access to their phone).

Client was asked, and permission was given for providers to:

- Call the client
- Leave voicemail for the client
- Announce themselves as the agency reaching out

Services Provided: Triage Assessment, VISPDAT, BNL Placement, Referrals
Referrals Provided: XYZ Shelter, ABC Rental Assistance
****Reach out to DV CE Specialist and local Regional Manager for client contact info****
(PEV, 211)

Design HTML Preview

Send

30. Click Profile, then Case Notes

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



usw.clienttrack.net/19/MainPage.aspx?Inline=true

Patricia Espinosa-Vargas (Training) | Help | Sign Out

Clients | DV Jetson | CLIENTID 148

Client Referrals

Below is a list of all existing referrals for the selected client. To add a new referral for the client, click the **Add New Referral** button. To view or edit a record displaying in the list, click **Edit Referral** next to the desired record. Click **Services** next to a referral record in order to view or add services that reference the referral. To get directions from the client's address to the provider, click the **Get Directions** option. To print a referral voucher, click **Referral Voucher** next to the desired record.

+ Add New Referral | Quick Referrals | Housing Referral | Referral Eligibility | Referral In

1 result found.

| Service | Referral Date | To Provider | Status | Result |
|--|---------------|--|---------------|--------|
| CE - Referral to Emergency Shelter bed opening | 05/20/2020 | My Fake Organization - Emergency Shelter | Referral Made | |

Waiting for usw.clienttrack.net...

Type here to search

8:15 PM 5/20/2020

31. Click Add New Case Note

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



usw.clienttrack.net/19/MainPage.aspx?Inline=true

Patricia Espinosa-Vargas (Training) | Help | Sign Out

Clients

Dashboard
Find Client
Intake
COVID-19 Intake

Profile

- Edit Client
- Alias History
- Address History
- Case Managers
- Case Notes**
- Client Files
- Client Photo
- Information Release
- Information Release Exceptions
- Interested Others
- Current Living Situation

ClientTrack All Search

DV Jetson CLIENTID 148
Client refused

Client Case Notes

The client's case note history displays below. To create a new case note, click **Add New Case Note**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the Print box next to one or more case notes, and then click **Print Selected**.

+ Add New Case Note Print Selected

No records found.

| Date ▼ | Regarding ▲ | User ▲ | Organization ▲ | Print <input type="checkbox"/> |
|--------|-------------|--------|----------------|--------------------------------|
|--------|-------------|--------|----------------|--------------------------------|

Cancel

32. Please complete the following

COORDINATED ENTRY TUTORIAL

COMPLETING A DV ANON ASSESSMENT



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

Clients | ClientTrack | All | Search | Patricia Espinosa-Vargas (Training) | Help | Sign Out

DV Jetson | CLIENTID 148 | Client refused

Case Note with Services

Entry Date: 05/20/2020
User: Patricia Espinosa-Vargas
Regarding: **CE VI-SPDAT**
Note Type: -- SELECT --

Supervisor Review

If a supervisor review is required, please check the box and select the name of the individual to make the assignment.

Review Required: ☐

Case Note

Client Name: DV Jetson

CLIENT IS LOOKING TO BE HOUSED IN LEHIGH, NORTHAMPTON AND CARBON COUNTIES.

Client fleeing domestic violence (DV) situation.
Client is temporarily safely housed with a friend/family member.
Client already contacted DV service, but they were unable to assist.
Client does not have a DV case manager, as such, client consents to being contacted directly at the number listed on Smartsheet. (Client was asked and stated that no one else has access to their phone).

Client was asked, and permission was given for providers to:

- Call the client
- Leave voicemail for the client
- Announce themselves as the agency reaching out

Services Provided: Triage Assessment, VISPDAT, BNL Placement, Referrals
Referrals Provided: XYZ Shelter, ABC Rental Assistance

****Reach out to DV CE Specialist and local Regional Manager for client contact info****
(PEV, 211)

Read Only: ☒

Save | Cancel

COORDINATED ENTRY TUTORIAL

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."***