



Coordinated Entry Specialist Procedures - CE Homeless Prevention Enrollment
Updated: February 15, 2021

Households that meet the HUD Categories 2, 4, and At-Risk (including doubled-up/couch-surfing) are eligible for enrollment in the Connect to Home CE Homeless Prevention program. They should receive referrals to each program type for which they meet the major eligibility criteria.

Program	Major Eligibility Criteria
Emergency Solutions Grants (ESG), inc. Coronavirus (ESG-CV)	<ul style="list-style-type: none"> • 50% Average Median Income (AMI) or less (increased from 30% AMI through Sep 2022). Note: Waiver <u>not</u> reflected in CE HP Excel Tools. • Housing loss in 21 days or less. • One-time payment up to 6 months of rental arrears, including any late fees on those arrears <u>and/or</u> short-term rental assistance (inc. rent subsidy, security deposit, last month's rent, moving costs, utility deposits/payments); total assistance cannot exceed 24 mos. in 3 years.
Community Development Block Grant (CDBG)	<ul style="list-style-type: none"> • 80% Average Median Income (AMI) or less. • Housing loss in 21 days or less. • Up to 6 months of rental arrears.
Community Services Block Grant (CSBG), inc. Coronavirus (CSBG-CV)	<ul style="list-style-type: none"> • Income at or below 200% of Federal Income Poverty Guidelines (FPIG) from all sources except food programs (increased from 125% FPIG due to COVID-19). Note: Waiver not reflected in CE HP Excel Tools. • Maximum assistance \$1,000/adult HH or \$1,500/households w/children.
Homeless Assistance Program (HAP)	<ul style="list-style-type: none"> • Income at or below 200% of Federal Income Poverty Guidelines (FPIG) from all sources except Medicare, Medicaid, food stamps, school lunches, LIHEAP, and housing assistance. • <u>No income restrictions</u> for Domestic Violence survivors (based on need). • HAP (not HUD) definition of homeless or near homeless.* • Maximum assistance \$1,000/adult HH or \$1,500/households w/children.
Supportive Services for Veteran Families (SSVF)	<ul style="list-style-type: none"> • Veteran(s) member of household. • 50% Average Median Income (AMI) or less. • Housing loss in 30 days or less. • Up to 9 months of rental arrears.

*For HAP purposes, individuals or families are considered homeless if they are experiencing any of the following:
 1. Reside in a group shelter; domestic violence shelter; hotel or motel paid for with public or charitable funds; a mental health, drug, or alcohol facility; jail; halfway house; or hospital with no place to reside; or living in a home, but due to domestic violence, needs a safe place to reside; 2. Have received verification that they are facing foster care placement of their children solely because of lack of adequate housing, or need housing to allow reunification with children who are in foster care placement; 3. Live in a "doubled-up" arrangement for six months or less on a temporary basis due to an emergency; 4. Live in a condemned building; 5. Live in housing in which the physical environment presents life and/or health threatening conditions (e.g. dangerous structural defects; lacks plumbing, heat, or utilities); 6. Live on the streets, in cars, doorways, etc. HAP considers individuals or families near homeless if they are facing eviction. An individual or family is facing eviction if they have received either written or verbal notification from the landlord that they will lose their housing unless some type of payment is received.

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Steps for CE Homeless Prevention Program Enrollment in PA HMIS

1. If the Head of Household presents as needing rental assistance to avoid becoming literally homeless, even if they are doubled-up, begin by searching for an existing client record in PA HMIS by asking for their full name, SSN, and/or date of birth.
 - a. If the client is not in HMIS, add a new client record by selecting/beginning an Intake from the Client menu. Add the basic client information for the Head of Household (HoH) and all family members. The workflow will then take you to Program Enrollment.
 - b. If the HoH is already in HMIS, check their client dashboard to see if they are already enrolled in Connect to Home CE Homeless Prevention and/or check their client notes to see if they have been screened for HP recently and for the county that they are currently residing in. If they have not been screened and referred for HP recently, then select Intake from the Client Menu, and select Use the current client.

The screenshot displays the ClientTrack software interface. On the left is a dark blue sidebar menu with options: Clients, Dashboard, Find Client, Intake, COVID-19 Intake, Profile, Client Photo, Release of Information, and Information Release Exceptions. The main content area shows the client profile for 'Lannister, Cersei' with a date of birth of 8/10/1978 and CLIENTID 224815. Below the profile is a vertical navigation bar for 'Intake (2298)' with options: Add or Edit (selected), Basic Client Information, Family Members, and Program Enrollment. A modal window titled 'Add or Edit' is open, asking 'Do you want to add a new client or use the selected client?' and providing three options: 'Add a new client' (highlighted with a red box), 'Use the current client', and 'Select another client'.

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2. For a new household, complete the Basic Client Information for the Head of Household and all Family Members. For an existing household, review their answers with them to ensure the information is accurate and up to date.

NOTE: While not a required field, make every effort to record at least one telephone number for the client/participant that is “safe to call” (and check the “Safe to Contact” check box if it is). Recording an email address (and checking if “Safe to Contact”) is also very helpful.

The screenshot displays the ClientTrack interface for a client named Lannister, Cersei (DOB: 8/10/1978). The 'Client Information' form is shown, with the 'Contact Information' section circled in black. The form includes the following fields and options:

- Race:** Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White, Client doesn't know, Client refused.
- Gender:** Male, Female
- Pregnancy Status:** Yes, No
- Veteran Status:** Yes, No
- Hide Address and Contact Information:**
- Contact Information:**
 - Address: [Text Field]
 - Address 2: [Text Field]
 - City, State, Zip Code: [City] [State] [Zip Code]
 - Email: [Text Field] Email Safe to Contact
 - Home Phone: 555-555-5555 Home Phone Safe to Contact
 - Work Phone: [Text Field] Work Phone Safe to Contact
 - Msg Phone: [Text Field] Msg Phone Safe to Contact
 - Safe Contact Information: [Text Field]

At the bottom right of the form, there are buttons for 'Finish' and 'No Changes'.

NOTE: CE Specialists should always strive to complete all required Client Information questions with complete answers (except for DV Anonymous intakes). Complete answers improve HUD reporting scores and reduce the need for data clean-up later on. For DV Anonymous Intakes, use the DV Anonymous name procedure (i.e., First Name is DV, last name is client/participant generated passcode). For DV Anonymous name Data Quality, select “Partial, street name, or code name” from the Name Quality pull-down menu. For other DV Anonymous Intake Personally Identifiable Information (PII), select “Client Refused”.

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3. Enroll the household in the new CE Homeless Prevention Project. (Do *not* enroll the household in the Eastern PA Coordinated Entry project, which is only for households that are literally homeless according to HUD Category 1 and 4 definitions.)

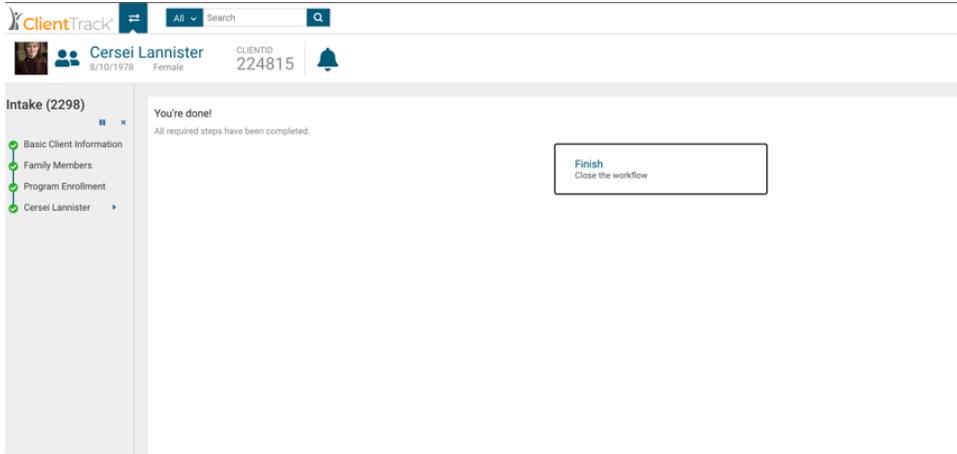
The screenshot shows the 'HUD Program Enrollment' form. At the top, the user is identified as Cersei Lannister (CLIENTID 224815). The left sidebar shows 'Intake (2298)' with steps: Basic Client Information, Family Members, and Program Enrollment. The main content area is titled '+ HUD Program Enrollment' and contains instructions: 'Select the Project you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.' Below this, it asks for the 'Project Start Date' and provides a list of project types with their definitions. A dropdown menu for 'Project' is open, showing options: '- SELECT -', 'Coordinated Entry', 'Eastern PA Coordinated Entry', 'Other', and 'CE Homeless Prevention'. The 'CE Homeless Prevention' option is circled in red.

4. For a new household, complete the Universal Data Assessment for the Head of Household and all Family Members. For an existing household, review their answers with them to ensure the information is accurate and up to date. You will have to answer the Health Insurance question to proceed. It is acceptable to simply choose "Data Not Collected" instead of asking the client/participant if you wish.

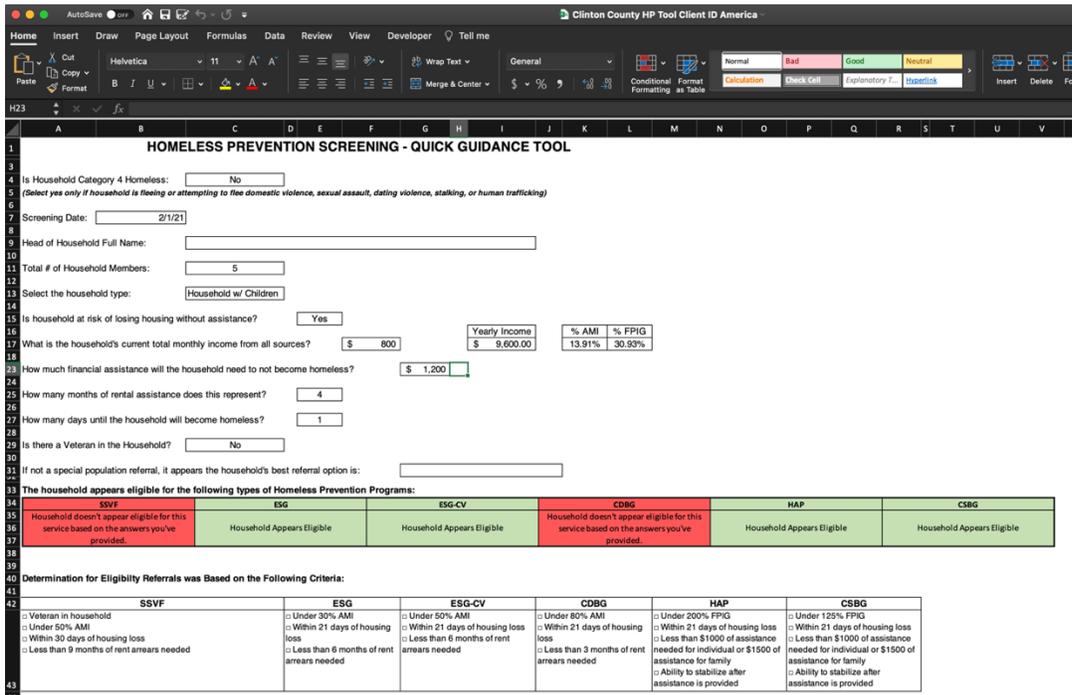
The screenshot shows the 'Universal Data Assessment' form. At the top, the user is identified as Lannister, Cersei (CLIENTID 224815). The left sidebar shows 'Intake (2298)' with steps: Basic Client Information, Family Members, Program Enrollment, Cersei Lannister, and New Assessment. The main content area is titled '+ Universal Data Assessment' and contains several sections: 'Disabling Condition' (set to 'No'), 'Client Location' (set to 'PA-509 - Eastern Pennsylvania CoC'), 'Living Situation' (with questions about prior living situation, length of stay, and whether they stayed less than 7 nights), and 'Health Insurance'. The 'Health Insurance' section has a question: 'Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance resources for the client.' Below this question is a dropdown menu for 'Covered by Health Insurance' with options 'Yes' and 'No'. The 'Default Last Insurance Status' button is circled in red.

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- After you save the Universal Triage Assessment, the CE HP workflow is complete. You can now close the workflow.



- Leave PA HMIS open in your web browser and create a new HP Screening Tool in Excel from one of the Excel HP templates. You can download the templates here: <https://drive.google.com/drive/folders/12fhc5eL0YCVvGyqyw72yq0YNR6eKVj71?usp=sharing>. You must use the template for the county that the HoH currently resides in (or wishes to live in if they are doubled-up). The HoH cannot be screened and referred to multiple counties.



NOTE: It is essential to screen them for the appropriate county since the Average Median Income is different for each.

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NOTE: Due to the COVID-19 Pandemic, the income eligibility criteria for the following project types are increased (easier to qualify for) as follows. These are not reflected in the Excel screening tool formulas, so please apply your knowledge to making eligible referrals.

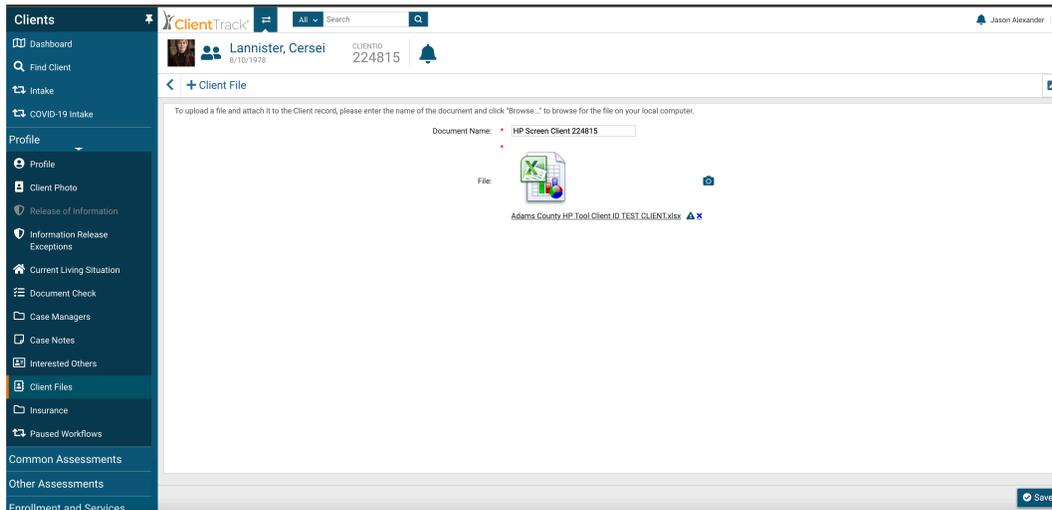
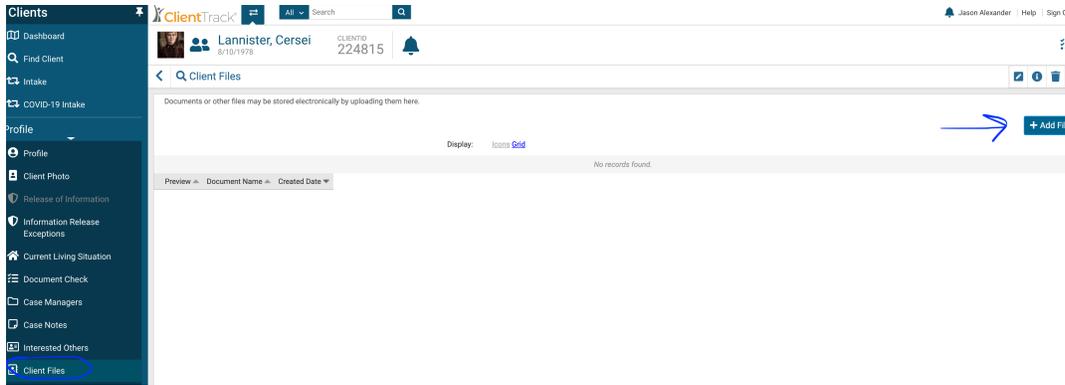
- ESG: Accepts households up to 50% AMI until September 30, 2022.
 - CSBG (and CSBG-CV): Accepts households up to 200% FPIG indefinitely.
7. Complete and save a copy of the HP Screening Tool for the HoH unless they are actively fleeing Domestic Violence.
 - a. If the HoH is actively fleeing DV, do not complete the screening tool. Instead, make a warm handoff to a VSP/DV provider. If they already have contact with an VSP/DV provider, proceed with the screening.
 - b. The date field should be entered as day/month/year as the following example:
1/29/21
 - c. After you have populated all the fields in the Excel sheet, any programs for which the HH is eligible will be highlighted in Green.
 8. Using the most recent **Connect to Home Coordinated Entry Specialist Procedures - Making Referrals** (find the most recent procedures here: https://drive.google.com/drive/folders/1oxXPaBvw_F7kX3ORJSKerbnfbsUjKrYT?usp=sharing), refer to the CES Referral Partner Matrix to make a direct referral to one or more HP providers of each eligible type in their county. Always attempt to make the referral through PA HMIS if the provider agency is in the system.

NOTE: Always refer Veterans to the closest SSVF provider, even if there is not one in their current county.

NOTE: ESG, ESG-CV, and HAP prevention programs serve HUD Categories 2, 4, and At-Risk of homelessness, including households that are doubled-up/couch surfing as long as the doubled-up household is living in the home of another because of economic hardship and has been notified in writing that their right to occupy their current housing or living situation will be terminated within 21 days after the date of application for assistance. A written notice from the leaseholder that they must vacate the residence will suffice to provide financial assistance.

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9. Save the HoH's completed Excel HP Screening Tool and upload it to their Client Files in their Profile in PA HIMS.



NOTE: Do not attach the client's Excel worksheet to any email, not even to an HP provider you are referring to that is not participating in PA HMIS.

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10. From the Client Menu, scroll down to Profile and select Case Notes. Click Add New Case Note. Add the new Case Note to the Client's record in PA HMIS whose subject uses the following format: [Current] County HP Screening x/y/21. For example, "Adams County HP Screening 2/1/21".

The screenshot shows the ClientTrack interface for a client named Lannister, Cersei (CLIENTID 224815). The page is titled "Client Case Notes" and displays a table of case notes. The table has the following columns: Date, Regarding, User, Organization, and Print. The first row is circled in red, showing a case note dated 02/15/2021 regarding "Adams County HP Screening 2/1/21" by Jason Alexander at Connect To Home. The second row shows a case note dated 09/24/2020 regarding "RRH - engaging" by Jackie Condor at Clinton County Housing Coalition. The third row shows a case note dated 09/09/2020 regarding "ES - referral" by Jackie Condor at Connect To Home. The fourth row shows a case note dated 08/31/2020 regarding "CE - VISPDAT Completed" by Jackie Condor at Connect to Home CE Northern Tier Region. In the top right corner of the table area, there are two buttons: "+ Add New Case Note" and "Print Selected", both of which are circled in red.

Date	Regarding	User	Organization	Print
02/15/2021	Adams County HP Screening 2/1/21	Jason Alexander	Connect To Home	<input type="checkbox"/>
09/24/2020	RRH - engaging	Jackie Condor	Clinton County Housing Coalition	<input type="checkbox"/>
09/09/2020	ES - referral	Jackie Condor	Connect To Home	<input type="checkbox"/>
08/31/2020	CE - VISPDAT Completed	Jackie Condor	Connect to Home CE Northern Tier Region	<input type="checkbox"/>

This completes the Enrollment.