

DURHAM COORDINATED ENTRY GUIDEBOOK

FOR FAMILIES MOVING FORWARD

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Section: Receiving Referrals from Front Door

CE Central will send client referrals for both the Single and Families shelters for every entry. CE Central will contact the client with information about shelter intake procedures.

Step 1: Find Outstanding Referrals

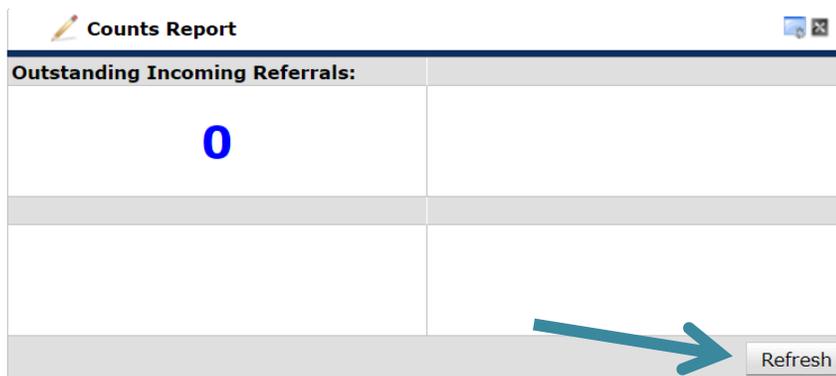
Shelter staff will then update the outcome of the Referral in HMIS by first finding the clients who were referred.

Find outstanding referrals via Dashlet

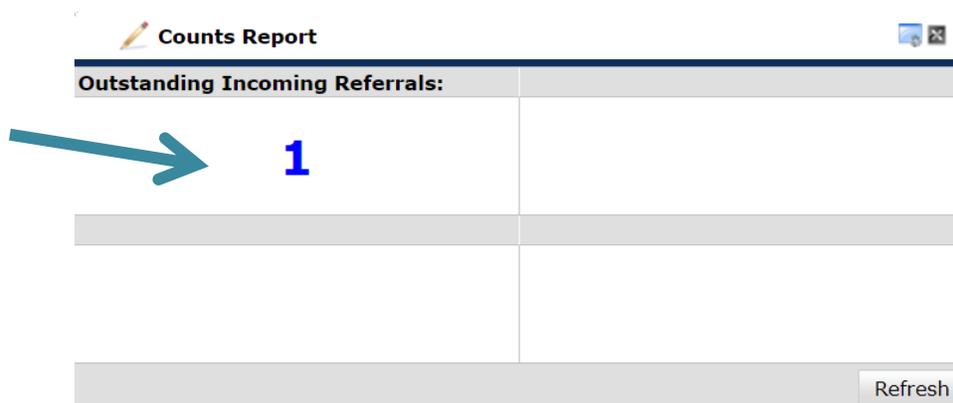
1. Confirm *Enter Data As* for the project you want to check incoming referrals for.



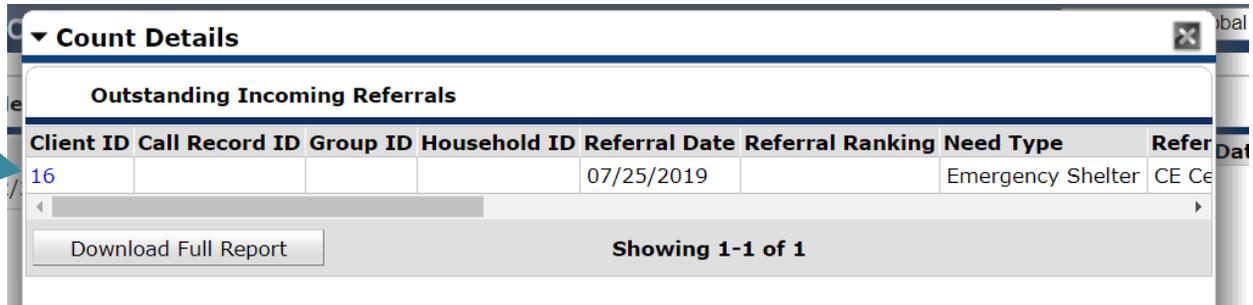
2. Click *Refresh* on *Counts Report Dashlet*.



3. Click blue hyperlinked number under *Outstanding Income Referrals* to check referrals for that project.



4. Click blue hyperlinked *Client ID* to navigate to *Client Profile* for entry and referral outcome updates.

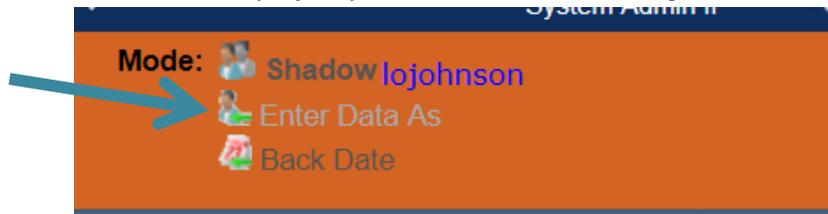


Client ID	Call Record ID	Group ID	Household ID	Referral Date	Referral Ranking	Need Type	Refer
16				07/25/2019		Emergency Shelter	CE Ce

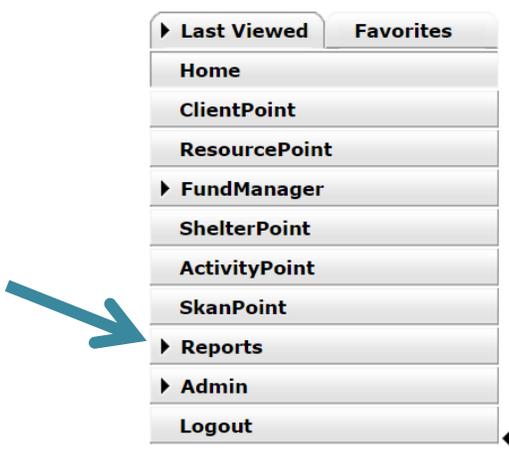
Download Full Report Showing 1-1 of 1

Find outstanding referrals via Referral Report.

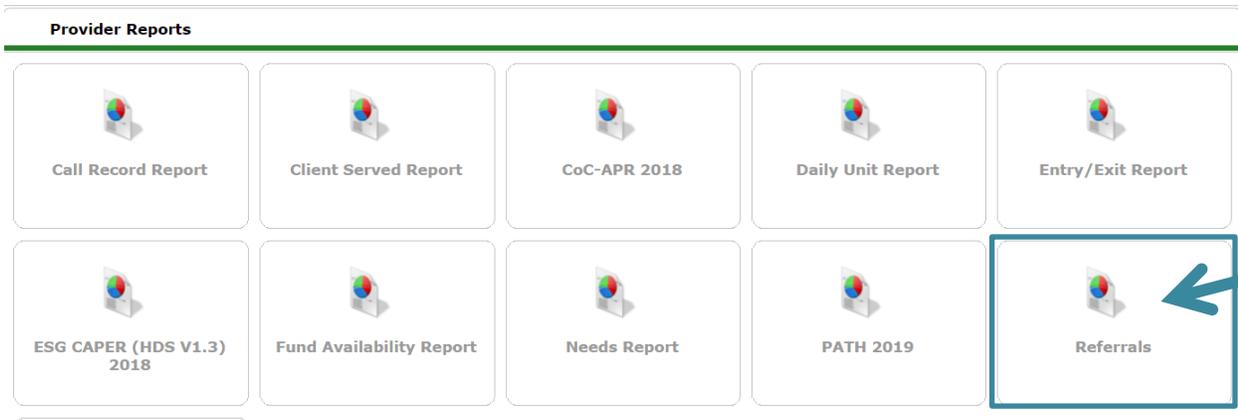
1. Confirm *Enter Data As* for the project you want to check incoming referrals for.



2. Click *Reports*.



3. Click *Referrals* report.



A. Complete report prompts

- i. Ensure *Provider* is correct based on EDA mode.
 - *if provider does not auto populate correctly then you might not be in the correct EDA mode and this will impact your report.
- ii. Select *This provider ONLY*.
- iii. Select *Incoming referrals to provider* from *Referral Type*.
- iv. Select *Outstanding* for *Referral Status*.
- v. Enter your date range you want to check referrals for.
- vi. Default *Sort Order* is by date, custom sorting is not required.

Report Options

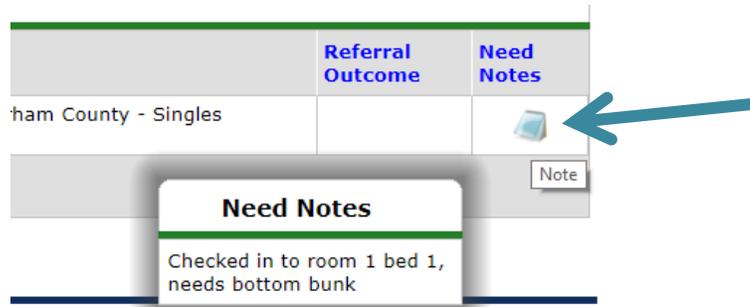
Provider *	Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private (5838)	
	<input type="radio"/> This provider AND its subordinates	<input checked="" type="radio"/> This provider ONLY
Referral Type *	Incoming referrals to provider ▼	
Referral Status	<input checked="" type="radio"/> Outstanding <input type="radio"/> Closed <input type="radio"/> ALL	
Referral Outcome	-All- ▼	
Referral Date Range	07 / 20 / 2019   	07 / 26 / 2019   
Sort Order	Please Select a Sort Order	<input type="button" value="Select"/> <input type="button" value="Clear"/>

B. Click *Build Report*.

Report Options

Provider *	Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private (5838) ▼	
	<input type="radio"/> This provider AND its subordinates	<input checked="" type="radio"/> This provider ONLY
Referral Type *	Incoming referrals to provider ▼	
Referral Status	<input checked="" type="radio"/> Outstanding <input type="radio"/> Closed <input type="radio"/> ALL	
Referral Outcome	-All- ▼	
Referral Date Range	07 / 20 / 2019   	07 / 26 / 2019   
Sort Order	Name (Ascending) Referral Date (Ascending) Referred By (Ascending) Need Type (Ascending) Need Notes (Ascending) Referral Outcome (Ascending)	<input type="button" value="Select"/> <input type="button" value="Clear"/>
<input type="button" value="Export Report"/>		<input type="button" value="Build Report"/> <input type="button" value="Clear"/>

- C. *Notes* may be viewed for clients by hovering the mouse over the notepad icon. CE Central staff will update the “notes section” with direction on the bed/room the client was placed in and household composition. Any additional needs they may have will also be identified here.



- D. Review for outstanding referrals. Click blue hyperlinked *Name* and *Client ID* to navigate to *Client Profile* for entry and referral outcome updates.

Report Results

Referral Date	Name	Group ID	Ranking	VI-SPDAT	TAY-VI-SPDAT	VI-FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
07/25/2019 2:00:00 AM	(16) Ice Cream, Flavor of						Emergency Shelter	CE Central - Durham County - DSS Front Door	Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private		

Select ALL Clear Showing 1-1 of 1

Step 2: Enter Clients into *ClientPoint*

If client/household presents at Shelter for intake, record their new Project Start/Entry into Shelter.

1. Identify the client(s) referred in the *Referrals Report* to know who has a room reserved
 - a. Check the *Need Notes* for direction on the bed/room the client was placed in. And to know what additional needs they may have.
2. Go to *ClientPoint* to find and confirm or update the *Client Profile* tab
 - a. Update *Client Demographics* if necessary
 - b. Update *Client Contact Information* if necessary

Client Information
Service Transactions

Summary
Client Profile
Households
ROI
Entry / Exit
Case Managers
Case Plans
Measurements
Assessments

Client Record
Issue ID Card

Name	Bryant, Kobe
Name Data Quality	Full Name Reported
Alias	BlackMomba
Social Security	***-**-6789
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	Yes (HUD)
Age	39

Change
Clear

Client Demographics

Date of Birth	08/11/1980
Date of Birth Type	Full DOB Reported (HUD)
Gender	Male
Primary Race	Black or African American (HUD)
Secondary Race	
Ethnicity	Non-Hispanic/Non-Latino (HUD)

Client Profile: all projects

Third Race	<input type="text" value="-Select-"/>	
Fourth Race	<input type="text" value="-Select-"/>	
Fifth Race	<input type="text" value="-Select-"/>	
Driver's License/ID Number	<input type="text"/>	
Issuing State for ID	<input type="text" value="-Select-"/>	
Home Phone / Contact Number	<input type="text"/>	

Client Contact Information (Client Profile)

	Primary Phone Number	Secondary Phone Number	Receives Texts	Other contact method (frequent location)	Start Date *
	321-123-0987				08/07/2019

Add
Showing 1-1 of 1

Emergency Contact Information (Client Profile)

	Name of Emergency Contact	Relationship to Client	Primary Phone Number	Secondary Phone Number	Primary Language Spoken
	Bean Bryant	Father	987-765-4321		

3. Add the household with complete information
 - i. On the *ROI* tab, complete the Electronic ROI for all household members

- ii. On the *Entry/Exit* tab, complete full Intake assessment (Project Start: ES) for all household members
- iii. Confirm that all household members have appropriate Project Start

Step 3: Update Referral Outcome

The outcome of every referral must be recorded in HMIS.

Update Referral Outcome through *ClientPoint*

1. In client's profile select *Service Transactions* tab.

Client - (16) Ice Cream, Flavor of

(16) Ice Cream, Flavor of
Release of Information: Ends 07/09/2020

Client Information | **Service Transactions**

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Measurements | Activities

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private (5838)	HUD	07/25/2019				

Add Entry / Exit | Showing 1-1 of 1

2. Click *View Entire Service History*.

Client Information | **Service Transactions**

Service Transaction Dashboard

Add Need | Add Service | Add Multiple Services | Add Referrals | View Previous Service Transactions

View Shelter Stays | **View Entire Service History**

3. Find the appropriate referral from the CE Front Door project and click the edit pencil on that row.

All Service Transactions

Select Dates: -Select- | Start Date: / / | End Date: / / | Search

Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
Need	07/25/2019	CE Central - Durham County - DSS Front Door	Emergency Shelter	In Progress / Service Pending	
Referral	07/25/2019	Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Emergency Shelter		

Showing 1-1 of 1

4. Scroll to the *Referral Data* section and update the *Referral Outcome* to either *Accepted* or *Declined* or *Cancelled*.

A. If client/household completes shelter intake

- i. Confirm the outcome of the referral as *Accepted*

Referral Data		Send Summary
Referred-To Provider	Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private (5838)	
Needs Referral Date *	08 / 23 / 2019 4 : 48 : 28 PM	
Referral Ranking	-Select-	
VI-SPDAT Score	Please Select a VI-SPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/>	
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/>	
VI-FSPDAT Score	Please Select a VI-FSPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/>	
Referral Outcome	Accepted	

B. If client/household is a No-Show

- i. Confirm the outcome of the referral as *Canceled* and the reason as *Client Did Not Return*
- ii. Include the bed the client had been placed in, into the Vacancy form

C. If client/household is declined by Shelter (and never gets to Intake)

- D. Confirm the outcome of the referral as *Declined* and the reason as *Client was denied services*

Referral Data	
Referred-To Provider	Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private (5838)
Needs Referral Date *	07 / 25 / 2019 2
Referral Ranking	-Select-
VI-SPDAT Score	Please Select a VI-SPDAT Score <input type="button" value="Search"/>
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score <input type="button" value="Search"/>
VI-FSPDAT Score	Please Select a VI-FSPDAT Score <input type="button" value="Search"/>
Referral Outcome	Declined
If Canceled or Declined, Reason	

-Select-
 Active Addiction
 Agency Funds Not Available
 All Services Full
 Already Provided By Other Provider
 Banned Client
 Client Could Not Be Contacted
 Client did not return/complete application
 Client Not Eligible
 Client Refused Service
Client was denied services
 Ineligible-No Children
 Ineligible-not homeless
 Ineligible-Over Income
 Ineligible-Under Income
 Pending Action Accounting
 Pending Approval
 Service Does Not Exist
 Service Not Accessible
 -Select-

- i. Include the bed the client had been placed in, into the Vacancy form

E. If client/household is cancels Shelter

- i. Confirm the outcome of the referral as *Canceled* and the reason as *Client Refused Service*
- ii. *Save and Exit* the referral

Referral Data [Send Summary](#)

Referred-To Provider	Families Moving Forward - Durham County - The NEST - City ESG State ESG (7071)		
Needs Referral Date *	09 / 05 / 2019	4	: 36 : 26 PM
Referral Ranking	-Select-		
VI-SPDAT Score	Please Select a VI-SPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/>		
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/>		
VI-FSPDAT Score	Please Select a VI-FSPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/>		
Referral Outcome	Canceled		
If Canceled or Declined, Reason	Client Refused Service		

Follow Up Information

- i. Find the *Need Information Notes* to edit with additional information the client gave you
 1. Click on the pencil icon next to the referral (yes, it's the one you just edited)
- ii. Find the *Need Information* section and click on the pencil icon

Household Members

To update Household members for this Referral, click the box beside each name.

(54) Child w/single parent

- (177) Bryant, Kobe
- (189) Bryant, Tommy

 **Need Information**

Need	Emergency Shelter (BH-1800)
Provider	CE Central - Durham County - VoA Front Door (7612)
Date of Need	09/05/2019 04:36:26 PM
Amount if Financial	No amount entered.
Notes	9.5.19 2:37 pm Family's intake scheduled for 5pm for Room 6. CJ

- iii. Add notes about the client's reason for canceling, where they will stay tonight, and whether they want shelter tomorrow. Make sure they are properly formatted.
 1. New notes will go above the previous notes
 2. The first row of the note will be the Date and Time
 3. The second row will be the note information and your initials
- iv. Click *Save & Exit*

Need Information

Provider * CE Central - Durham County - VoA Front Door (7612) ▼

Need * Emergency Shelter (BH-1800) ▼

Date of Need * 09 / 05 / 2019 4 ▼ : 36 ▼ : 26 ▼ PM ▼

Amount if Financial

Notes

9.5.19 5:49 pm
Family received offer to stay with family, canceled shelter. Advised family they may risk their position on the waitlist. SM

9.5.19 2:37 pm
Family's intake scheduled for 5pm for Room 6. CJ



- v. Include the bed the client had been placed in, into the Vacancy form

Referral Outcome Reference Table

The table below lists how to respond in all four types of situations after a referral is made. There are more options available in the Referral Outcome Reason, but only use the options below.

Referral Result	Referral Outcome in HMIS	Referral Outcome Reason in HMIS
Intake happens	Accepted	-
Client declines shelter	Canceled	Client Refused Services
Shelter declines client	Declined	Client was denied services
Client no-shows	Canceled	Client did not return

Step 4: Update Shelter Customized Questions

If the client's Referral is successful, continue to the shelter's customized questions.

1. Go to the Assessments tab
2. The Default Assessment will be your Shelter's customized questions
3. Complete the questions appropriately and Save & Exit

Section: Exiting a Client

In HMIS, clients should have continuous Entries for every night they stay in the shelter. When a client no longer uses a bed, they should be Exited. Whether clients leave for positive, neutral, or negative reasons, the steps to exit clients from HMIS.

1. Once logged into HMIS, confirm EDA for the correct shelter project
2. Confirm the correct date is selected.
 - a. If the client stayed last night, but left sometime today, you don't need to change the date.
 - b. If the client did not stay last night and did not exit today, change Backdate mode to the correct date.
3. Go to *ClientPoint* and find the correct project entry row for this client/household
4. Click on the pencil next to the blank *Exit Date* to exit the household (make sure all appropriate household members have their boxes checked)

Client - (177) Bryant, Kobe

(177) Bryant, Kobe

Release of Information: **None**

-Switch to Another Household Member- ▾
Submit

Client Information

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Measurements | Assessments

Service Transactions

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit										
	Program	Type		Project Start Date	Exit Date	Interims	Follow Ups	Client Count		
	Families Moving Forward - Durham County - The NEST - City ESG State ESG (7071)	HUD		08/07/2019						
	CE Central - Durham County - VoA Front Door (7612)	HUD		08/07/2019		08/07/2019				

Add Entry / Exit
Showing 1-2 of 2

5. Record the most appropriate response for *Reason for Leaving* and *Destination*.
 - a. Common Reasons for Leaving:
 - i. *Completed program* is when a client leaves after moving into housing with support from the shelter
 - ii. *Left for housing opp. before completing program* means that the client found other housing without direct support from the shelter
 - iii. *Unknown/Disappeared* is used when shelter staff do not know the reason for leaving
 - b. Common Destinations:
 - i. *Place not meant for habitation* is used when the client is returning to a Literally Homeless situation (not shelter)
 - ii. *Emergency Shelter, including hotel or motel stay paid for with emergency shelter voucher* refers to a temporary location paid for by the shelter or another community non-profit
 - iii. *Hotel or motel stay paid for without emergency shelter voucher* is when the client pays for a temporary location themselves

- iv. *Permanent Housing (other than RRH) for formerly homeless persons* refers to Permanent Supportive Housing or Other Permanent Housing that does not require a disability but is dedicated to folks experiencing homelessness
- v. *No Exit Interview Completed* is used when no information about where the client is sleeping that night is available
- c. Click *Save & Continue*

i To update Household members for this Exit Data, click the box beside each name.

(54) Child w/single parent

- (177) Bryant, Kobe
- (189) Bryant, Tommy

Edit Exit Data - (177) Bryant, Kobe

Exit Date *	09 / 05 / 2019    6 : 12 : 43 PM
Reason for Leaving	Completed program
If "Other", Specify	<input type="text"/>
Destination *	Rental by client, with RRH or equivalent subsidy (HUD)
If "Other", Specify	<input type="text"/>
Notes	<input type="text"/>

- d. Complete the Exit Assessment for Head of Household and Adults with the most up to date information
 - e. Confirm that Disabling Condition, Health Insurance, Income, and Non-Cash Benefits are up to date
6. If additional information is available, go to *ClientPoint* and navigate to the client’s profile.
- a. On the *Client Profile*, confirm or update the client’s contact information or emergency contact information
 - b. Update any other information from *Client Notes* to *Service Transactions* from the client’s profile

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Section: Shelter Suspensions

Clients can be suspended from shelter following the Durham Coordinated Entry Policies and Procedures.

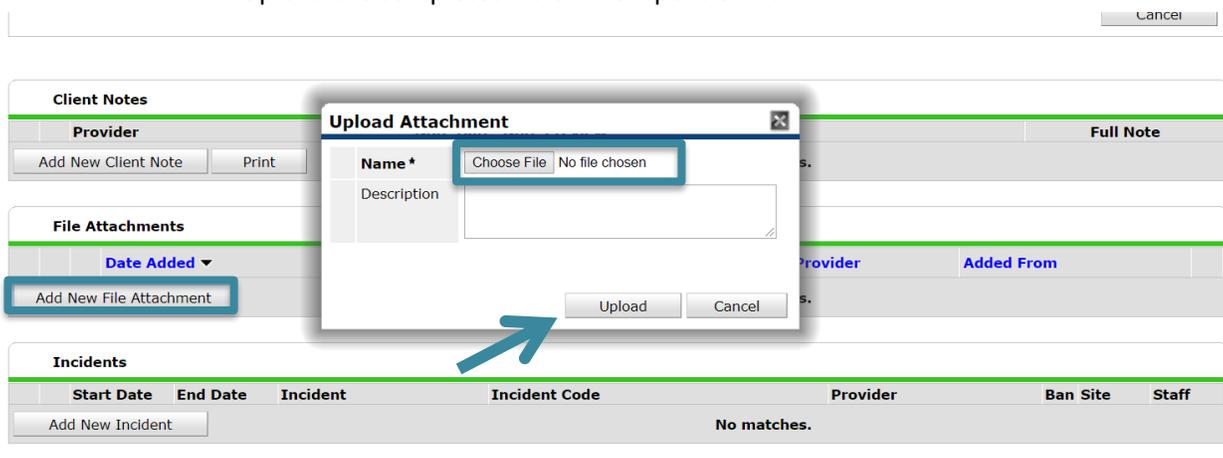
Step 1: Review Policy and Procedures

1. Confirm that client engaged in qualifying incident according to the policies and procedures.
2. Confirm that all required actions by staff have been taken appropriately.
3. Determine the length of referral suspension according to policies and procedures specifications.
4. Complete required Shelter Referral Suspension Form. Find the form on ncceh.org/durhamce.

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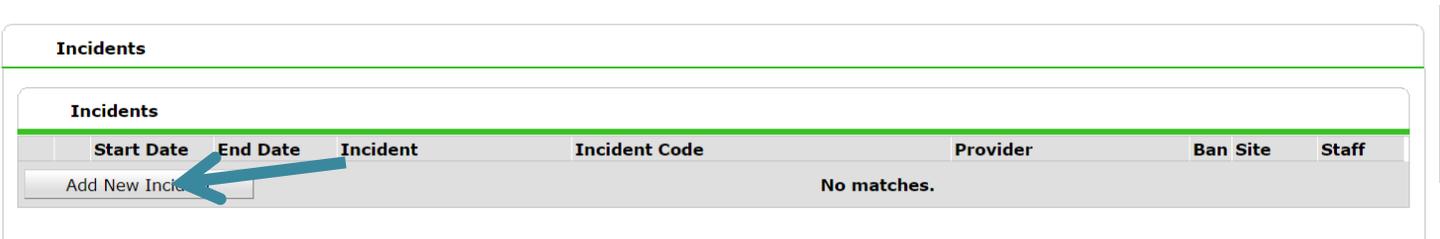
Step 2: Add Incident to alert CE Central

1. Log in to HMIS, EDA into the correct shelter project and navigate to *Client Profile* via search.
2. Confirm the correct date is selected
 - A. If the incident occurred today, you don't need to change the date.
 - B. If the incident was not today, change Backdate mode to the correct date.
3. Go to *ClientPoint* and navigate to the *Client Profile*
 - A. Scroll down to the File Attachments section
 - B. Upload the completed Referral Suspension Form



The screenshot shows the 'Client Profile' page with the 'File Attachments' section highlighted. An 'Upload Attachment' dialog box is open, showing a 'Name*' field with a 'Choose File' button and 'No file chosen' text, a 'Description' field, and 'Upload' and 'Cancel' buttons. A blue arrow points to the 'Upload' button. The background shows the 'Client Notes' and 'Incidents' sections.

4. Scroll to the bottom of the *Client Profile* tab to the *Incidents* section.



The screenshot shows the 'Incidents' section at the bottom of the 'Client Profile' page. It features a table with columns: Start Date, End Date, Incident, Incident Code, Provider, Ban Site, and Staff. Below the table is an 'Add New Incident' button. A blue arrow points to the 'Add New Incident' button. The text 'No matches.' is displayed below the table.

5. Click *Add New Incident*.

6. Confirm that *Provider* is correct *if *Provider* is not correct your EDA mode is probably not correct and needs to be changed.

Provider *	Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private (5838)
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7. Add *Start Date* for date the suspension begins and *End Date* for when it ends.

Start Date *	07 / 29 / 2019	  
End Date	08 / 29 / 2019	  



- A. Qualifying incidents for shelter referral suspensions with maximum lengths.

Credible verbal threat to do physical harm or stalk	Maximum 3 mo
Acted with intention or result for doing physical harm or stalking	Maximum 1 year
Unauthorized guest who endangered safety of others on premises	Maximum 2 mo
Had a weapon in possession onsite	Gun- Maximum 1 year
	No Gun- Maximum 6 mo
Sexual harassment or sexually inappropriate behavior	Maximum 6 mo

Gang activity onsite	Maximum 6 mo
Possession of illegal substances onsite	Maximum 2 mo
Engaged in illegal activity with intention/result of selling controlled substances	Maximum 2 mo
History of intimate partner or family violence against client currently in shelter that poses credible threat	Remove the survivor to shelter run by victim

	service provider and remove suspension
--	--

8. Select *Incident* from the picklist based on list provided below for suspension incidents.

Durham Suspension Reason	Possible incident picklist option(s)
Made a credible verbal threat to do physical harm to or stalk another shelter resident, staff member, or visitor	credible verbal threat
Took action with the intention or result of doing physical harm to or stalking another shelter resident, staff member, or visitor.	violent behavior
Took action with the intention or result of destruction or theft of onsite property.	property destruction and/or theft
Brought an unauthorized guest onsite whose presence endangered the safety of other people on the premises.	unauthorized guest
Had a weapon in their possession onsite. Shelters should have a policy that specifically defines items banned as weapons on premises.	weapon possession
Engaged in sexual harassment of another person or engaged in sexually inappropriate behavior. Shelters should have a policy against sexual harassment that specifically describes banned behaviors.	inappropriate sexual behavior
Engaged in gang activity onsite	gang activity
Possessed illegal substances onsite.	possession or use of illegal substances
Engaged in illegal activity with the intention or result of selling controlled substances onsite	soliciting or selling illegal substances
Has a history of intimate partner or family violence perpetration against another client (aka: survivor) currently in the shelter and serving the client in question would pose a credible and imminent threat to the survivor.	Potential DV/IPV Issue

9. Leave *Incident Code* blank and *No* for *Ban*.

Incident	Property Destruction ▼
Incident Code	-Select- ▼
Ban	<input type="radio"/> Yes <input checked="" type="radio"/> No 

10. Complete *Staff Person* for staff completing the form and *Sites Barred From* for appropriate shelters.

Staff Person	BoB staff
Sites Barred From	Singles Shelters

11. Add additional *Notes* if needed.

Notes	
-------	--

12. Click *Save*.

13. Confirm *Incident* shows up on *Client Profile*.

Incidents									
	Start Date	End Date	Incident	Incident Code	Provider	Ban Site	Site	Staff	
 	07/29/2019	08/29/2019	Property Destruction		Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Yes	Singles Shelters	BoB staff	

Add New Incident Showing 1-1 of 1

Step 3: Upload Shelter Referral Suspension Request Report to Client Profile

1. In *Client Profile* scroll to the File Attachments section.

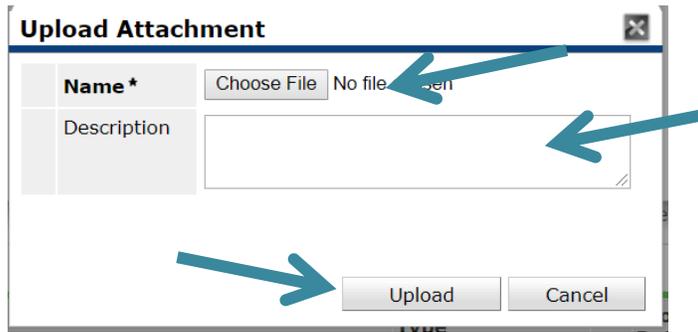
File Attachments							
	Date Added	Name	Description	Type	Provider	Added From	
No matches.							

Add New File Attachment

2. Click *Add New File Attachment*.

File Attachments			
	Date Added	Name	Description
Add New File Attachment			

3. Click *Choose File* and select appropriate Shelter Referral Suspension Request Report that has been completed, add a *Description* stating Shelter Referral Suspension Request Report (date suspension starts) and click *Upload*.



4. Confirm attachment shows up appropriately.

File Attachments									
		Date Added	Name	Description	Type	Provider	Added From		
			07/29/2019	Client 16 Shelter Referral Suspension Request Report 7-29-19.docx	Shelter Referral Suspension Request Report 7-29-19	docx	Urban Ministries of Durham - Durham County - Singles Emergency Shelter - Private	Client Profile	
Add New File Attachment			Showing 1-1 of 1						

5. Alert CE Admin for form/suspension review as needed.

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Section: Submit Shelter Vacancy Form

Once a room or bed is available for a new clients, shelter staff will notify CE Central through the Vacancy Form.

1. Go to nceh.org/durhamce to find the Vacancy Form link
2. Complete the contact information on the Vacancy Form

Shelter Vacancy Form

Name *

First Name Last Name

Email *

Phone *

Agency *

SELECT YOUR SHELTER ▾

3. Select the shelter you are reporting a vacancy for and complete the details that appear
4. At the bottom, record any additional notes that you think CE Central would find helpful to sending the next referral
5. Click *Submit* and check your email for a confirmation of the form submission