



# Coordinated Entry Program Connector HMIS User Manual

CA-508 Watsonville/Santa Cruz City & County





**About this Guide:** The purpose of this resource is to provide pointed guidance for specific steps in the HMIS Connector workflow. Please use the table of contents to direct you to specific topics of interest.

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**Additional Resources:** You can always navigate through the various lessons of the [HMIS Connector Training](#) or reach out to the Help Desk at [SantaCruz@Bitfcous.com](mailto:SantaCruz@Bitfcous.com) or (831) 713-2288 during regular business hours.



# HMIS CE Overview

**02 | CE ENROLLMENT**

- Understand Chronic Homelessness

**04 | HNA**

- H4H prioritizes when "Assessment is Complete and Ready for Scoring"
- New HNA Every 90 Days (Data Will Cascade)

**06 | EVENTS**

- Log Provided Events (i.e. Services) and Event Results

**08 | CLIENT TRANSFER**

- Communicate and Confirm with Potential New Connector Prior to Transfer

**01 | CLIENT PROFILE**

- Household
- Contact
- Location

**03 | CLS**

- Complete at Enrollment
- When Situation Changes
- At Least Every 90 Days

**05 | HAP**

- Develop with Participant(s) Overtime
- Print for Participant(s)

**07 | STATUS UPDATE**

- Complete When Situation Changes
- At Least Every 90 Days

**09 | EXIT**

- Housed/Housing Program
- Left County (+90 days)
- Institutional Care (+90 days)
- Deceased
- Not Interested in CE Resources
- Unable to be Contacted (+90 days)

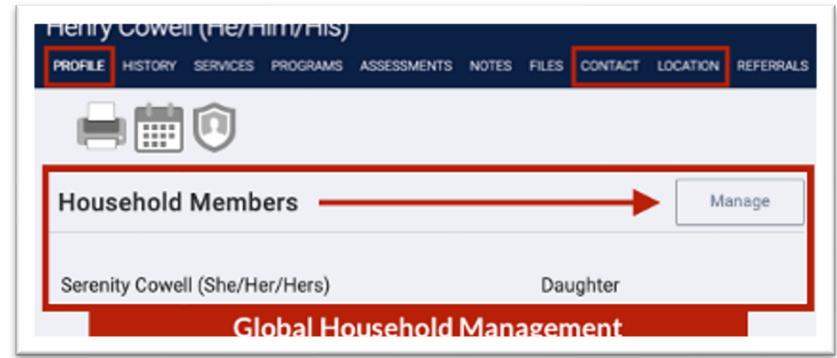




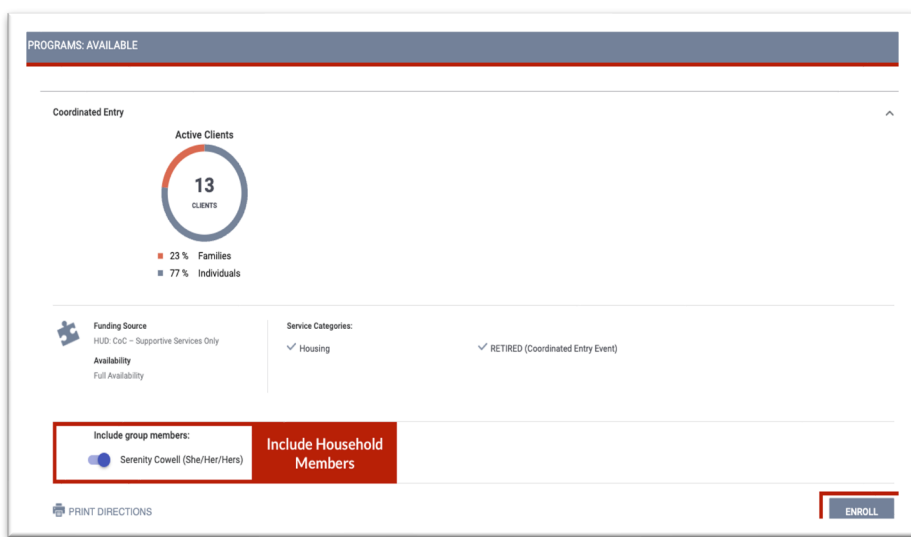
**Step 1: Switch into the Housing for Health Partnership Agency.**



**Step 2: Update Client Profile, Global Household, Contact, and Location**



**Step 3. Enroll Participant/Household in the Coordinated Entry program from the Programs tab.**



**Fields Used to Determine Chronic Homeless Status**

1. Prior Living Situation
2. Disabling Condition

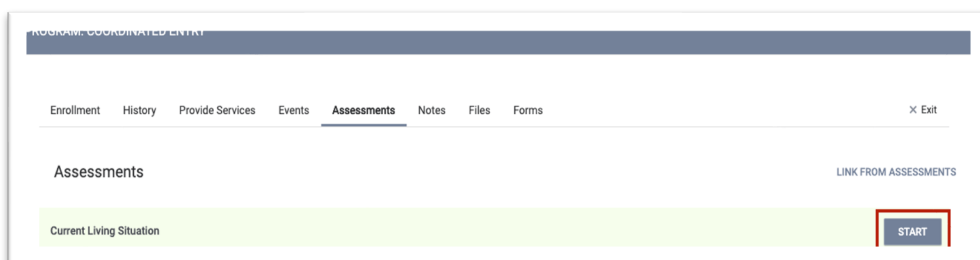
A chronically homeless person...

1. Has a disabling condition; AND
2. Currently lives in a place not meant for human habitation, or in an emergency shelter; AND
3. Has been homeless continuously for at least 12 months; OR has been homeless on at least 4 separate occasions for a combined total of 12 months in the last 3 years.

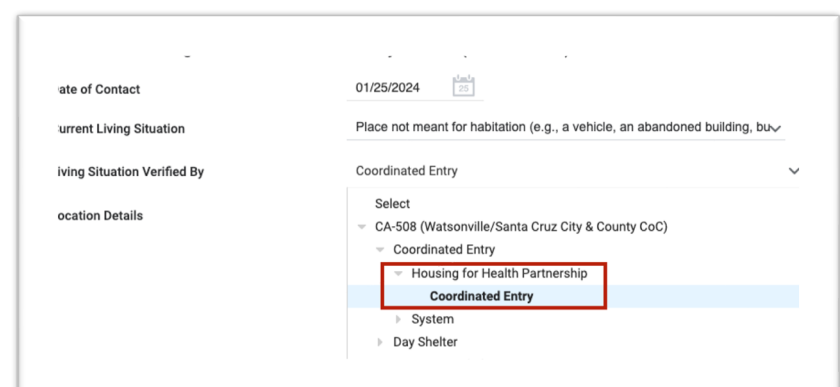
A break in homelessness is...

- o 7 consecutive nights of being housed (ex. "couch surfing," staying with friends or family, and motels paid for by clients)
- o 90+ days in an institution (jail, hospital, treatment facility, etc.)

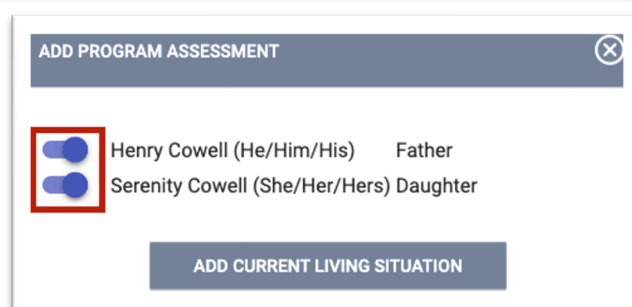
**Step 4. Complete a Current Living Situation Assessment as shown in the following steps:**



**Step 4b. Navigate the "Verified by" decision tree to Housing for Health Partnership's Coordinated Entry program**



**Step 4a. Include household members (if any).**



**Step 4c. Complete this process for additional household members (if any).**

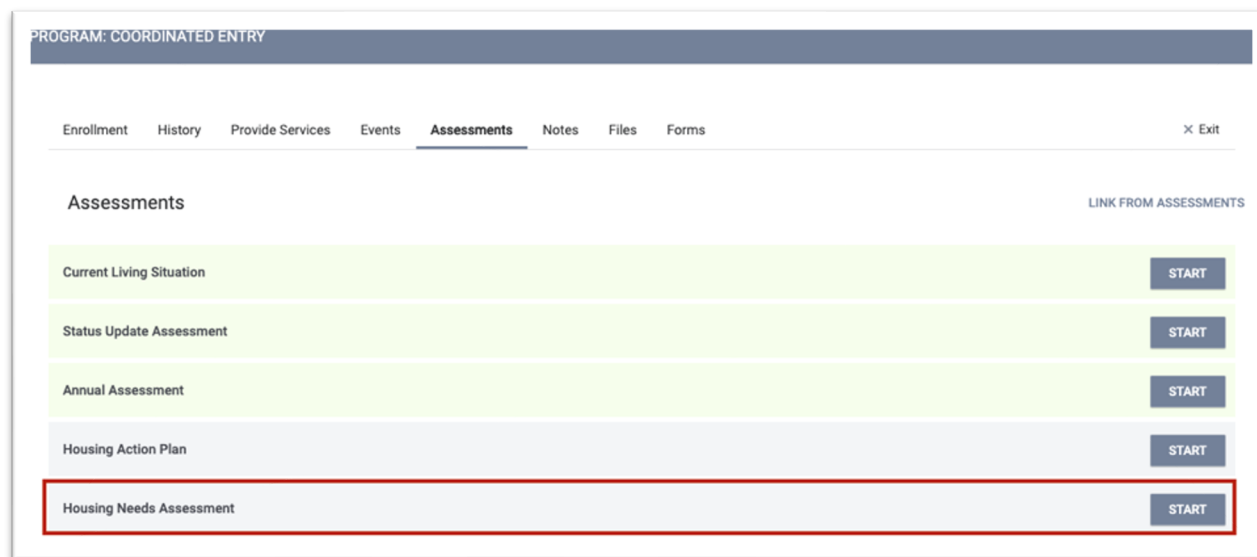


## IMPORTANT NOTE

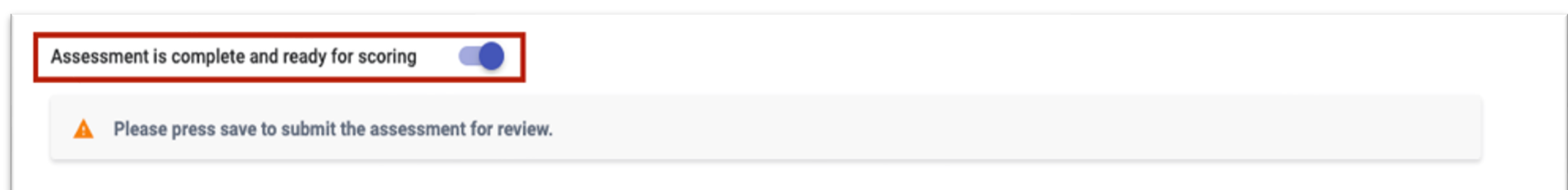


The order of the next steps is interchangeable and is ultimately determined by your work with participants and their needs. You don't need to follow the specific order of the next steps outlined below. However, if Step 7 is completed **before** Step 5, the data cascading function will not work.

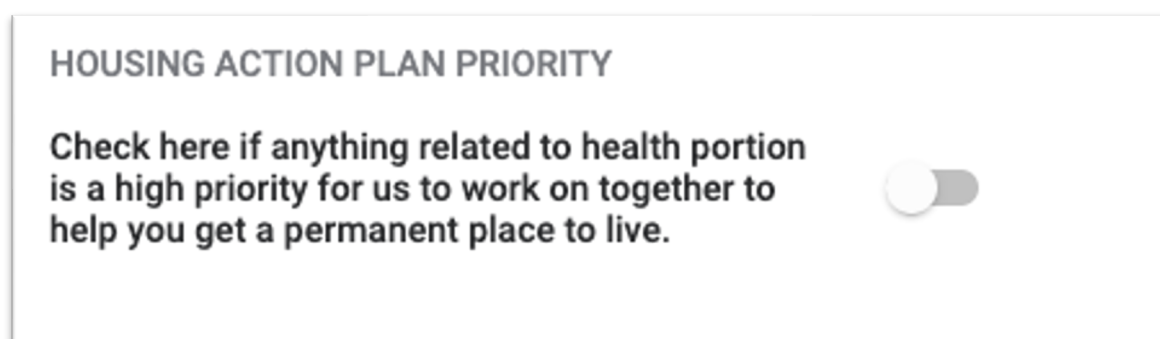
**Step 5. Start a Housing Needs Assessment (HNA) with participant. The HNA should always be completed in the Head of Household's program enrollment.**



- Once all required questions are completed, the “Assessment is complete and ready for scoring” toggle will reveal. Toggling this field ON and pressing save is what notifies the H4H team that this participant is ready to be reviewed for resource matching. Always remember to save the HNA before exiting the screen.



- Each section has a Housing Action Plan (HAP) Priority toggle. You will toggle this on when the participant identifies a goal related to the specific section. Once toggled on, sections notes will appear in new HAPs.



- These 3 [Live Markers](#) are populated with data from the client’s profile and/or global household. If any of the 3 Live Markers are incorrect, you must update the client profile and/or the household.
- These fields will cascade from the data entered on the program enrollment screen: Last Permanent Address fields, and Total Months Homeless in the Last 3 years. Please correct the program enrollment if this information is incorrect.

1. Total # of members in the household currently. (This field is auto-calculated from HMIS. If different than expected, edit global household associated with participant's profile):	2
2. Total # of children in the household currently. (This field is auto-calculated from HMIS. If different than expected, edit global household associated with participant's profile):	1
3. Total # of members in household desired (including the participant): Complete Household Comments if the numbers in #1 and #3 are different.	2
4. Household Comments:	
5. Age of participant (head of household):	19

LAST PERMANENT ADDRESS	
Street Address	22 Ocean St
City	Santa Cruz
State	California
ZIP Code	95060
13. Any adult household member's most recent housing was in Santa Cruz County:	Yes
14. Last time any adult member of your household had a lease or owned a home in their name. Select one adult with most housing history:	Never or more than 5 years ago
15. # of formal evictions in the last five years (e.g., law enforcement notice taped to front door, or might show in credit report, court records, or tenant screening databases). Select one adult with the highest amount of rental evictions:	No rental evictions
16. The participant/ household has a former property agent or other person that can provide a positive housing reference:	No
17. Total months homeless in the last three years, either on your own or with your family:	Two Months

## Step 6. Edit a Housing Needs Assessment.

Select the “Assessments” tab of the program enrollment record. Select the “Edit” icon to update the HNA. You will edit the Housing Action Plan in the same way once you get to that step.

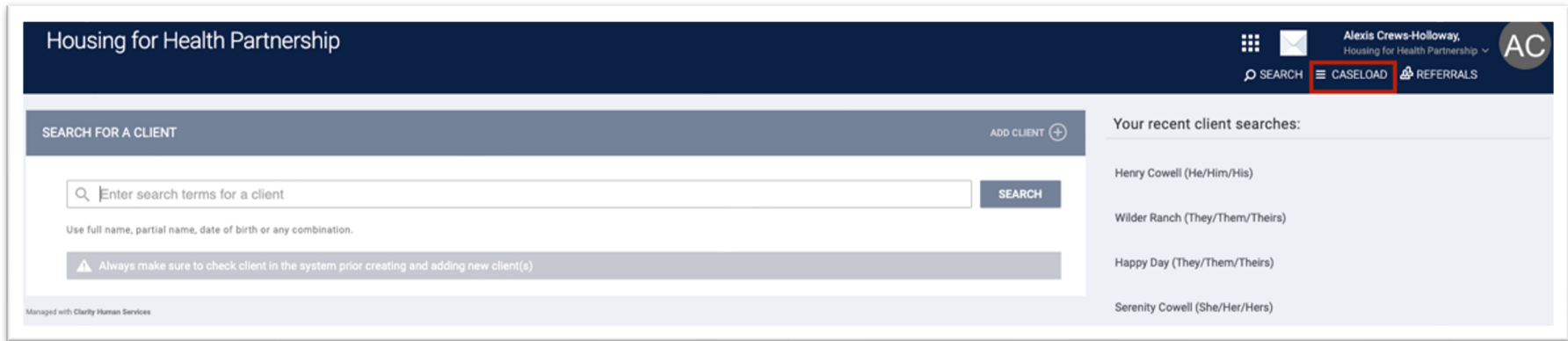
### IMPORTANT NOTE



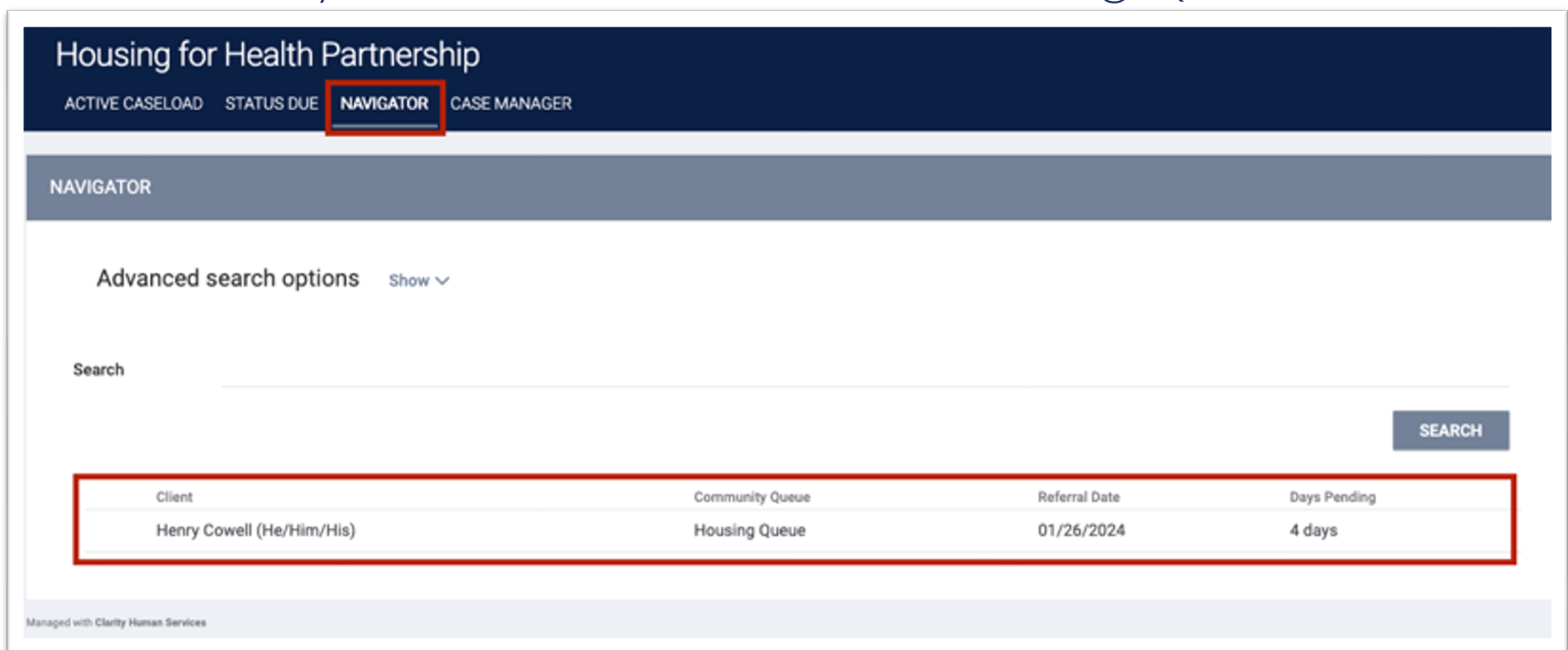
Create a new HNA if the participant’s situation changes, or at least every 90 days from the date of enrollment. For example, changes to household composition would be particularly important. [New](#) HNAs must be completed and saved with the “Assessment is complete and ready for scoring” field toggled on for a new score to generate and be sent to H4H for review.



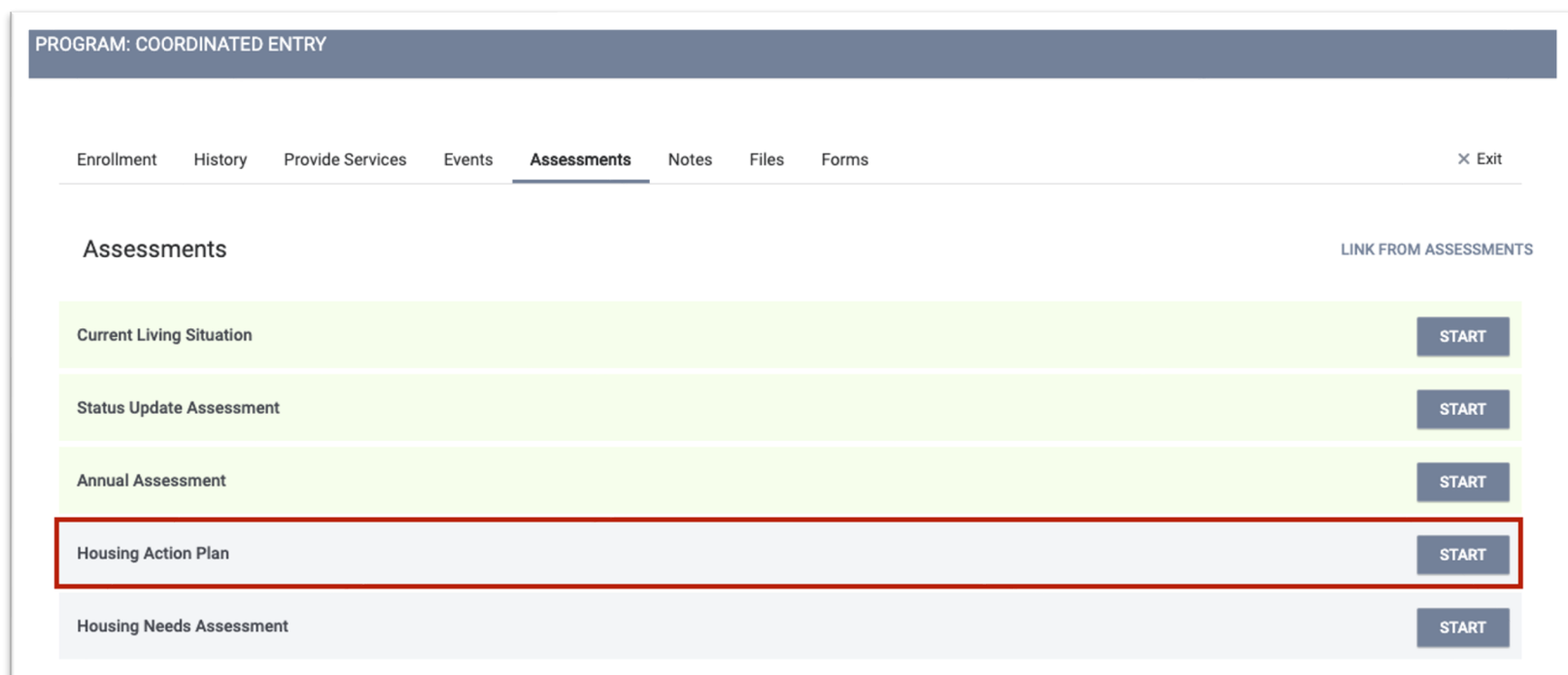
**Step 7.** Check your Navigator caseload weekly to see if a participant has been referred to the Housing Queue by selecting “Caseload.”



- Select the “Navigator” tab. A participant is not on the Housing Queue if they do not appear here. You are expected to continue to provide Connector Services with all your participants, regardless of whether they have been added to the Housing Queue.



**Step 8.** Start a Housing Action Plan (HAP) with the participant. The HAP should always be completed in the Head of Household’s program enrollment.







- Assessment Date, Connector Name, and the section notes related to the specified action plan priorities from the HNA will cascade into the HAP.

**HOUSING ACTION PLAN**

⚠ The Housing Action Plan or HAP is a plan developed from the household-directed housing stability goals identified during the completion of the Housing Needs Assessment. The HAP is meant to be a resource that facilitates the collaborative process between households and H4HP Connectors by which they work together to secure housing for the household. The HAP should include a small number of goals and can be updated to include additional goals as progress is made.

Assessment Date: 01/26/2024

Connector Name: Alexis Crews-Holloway

Section 1: Household Goals:

Notes: This is where you will take notes related to the Participant's household composition. This section will populate into the Housing Action Plan if the associated priority toggle is on.

- Work with the participant to flesh out the details of the specific goal they wish to achieve, how you will assist, and by when these tasks will be completed.

Goal

Participant Strengths (Current and Past)

Resources Needed to Achieve Goal

Participant Will...

By When

Connector Will...

By When

- The HAP is a living document. You should update dates and goal status as needed. A goal can be in the following status at any given time:
  - Not Started,
  - In Progress,
  - Achieved,
  - Progress Stalled, or
  - Abandoned for New Goal.

You should add new goals as needed.

Goal Status: Select

Goal Status Notes

Add Household Goal:

## Step 9. Print the participant's Housing Action Plan from their client Reports.

- Run the [SZ-101] Housing Action Plan Report. The report will only display goals that are “In Progress” or “Stalled.”

The screenshot shows the client profile for Henry Cowell (He/Him/His). The 'CLIENT REPORTS' section lists various reports, with '[SZ-101] Housing Action Plan Report' highlighted. An inset shows the report content, including 'Housing Goals' and 'Health Goals'.

SANTA CRUZ COUNTY Housing for Health PARTNERSHIP	
HMIS ID	Assessment Date 03/07/2023
Participant Name	Connector Name
<b>Housing Goals</b>	
Goal	Creating a rental history
Participant Resources	has a good, working relationship with her landlord. She also has never been formally evicted and has been a resident of Santa Cruz County her whole life.
Resources Needed	She needs a working phone and needs to utilize her free time/off days to reach out.
Participant Will	needs to reach out to her landlord and ask for either an 'on call' phone call reference or a formal rental reference letter from her landlord.
By When	03/28/2023
Connector Will	Provide sample rental application and start to build one together. Connector will also walk through free credit counseling service that Housing Matters recently made contact with.
By When	04/04/2023
Goal Status	In Progress
<b>Health Goals</b>	
Goal	Establishing counseling, for domestic violence support and mental health.
Participant Resources	knows that she needs to take time to process her DV trauma. She is her own best resource on her own mental health. She has also accessed resources like these before through Walnut Ave Clinic.
Resources Needed	needs time from work to access these services.
Participant Will	Call Walnut Ave to ask about group therapy session times and if she can keep receiving support.
By When	
Connector Will	Reach out to Monarch to see if an receive shelter or support from them.
By When	04/19/2023
Goal Status	In Progress

## Step 10. Log Coordinated Entry Events.

The screenshot shows the 'Coordinated Entry Events' form. The 'Problem Solving/Diversion/Rapid Resolution intervention or service' section is selected. The form includes fields for Date (01/29/2024), Result (Client housed/re-housed in a safe alternative), and a list of group members (Serenity Cowell (She/Her/Hers)). There is a 'SUBMIT' button at the bottom.


Select the Event you would like to log, including household members if appropriate, and fill in the requested data.

For Problem-Solving Event items, there is an additional field shown in the screenshot above. Indicate if the participant was

housed in a “safe alternative location” which means permanent housing in this community. The participant should be exited from the CE program at that point.



# Step 11. Complete Standard HMIS Assessments pursuant to local policy.

 THE COUNTY OF SANTA CRUZ 1850	All Funding Sources			
	At Program Enrollment		When Participant Situation Changes or At Least Every 90 Days	
	Current Living Situation Assessment	Status Update Assessment	Current Living Situation Assessment	Status Update Assessment
Coordinated Entry				

## Current Living Situation Assessments

Required to be completed at program enrollment AND when a participant’s situation changes, or at least every 90 days from the date of enrollment if the participant’s situation has not changed.

## Status Update Assessments

Required to be completed when a participant’s situation changes, or at least every 90 days from the date of enrollment if the participant’s situation has not changed.

## Annual Assessments

Required to be completed in lieu of a 4<sup>th</sup> quarter Status Update Assessment. This should be a rare occurrence as Connectors shouldn’t be working with participants longer than 90-180 days.

# Step 12. Transferring a Participant to a New Connector

When a secondary system enrollment is managed by a case manager who is also a Connector occurs, the Coordinated Entry enrollment must be reassigned to the Connector of the secondary enrollment, unless this Connector does not have capacity, or the participant prefers to continue with their original Connector.

There are two potential transfer scenarios you may encounter.



## 1. You are transferring an enrollment to another Connector.

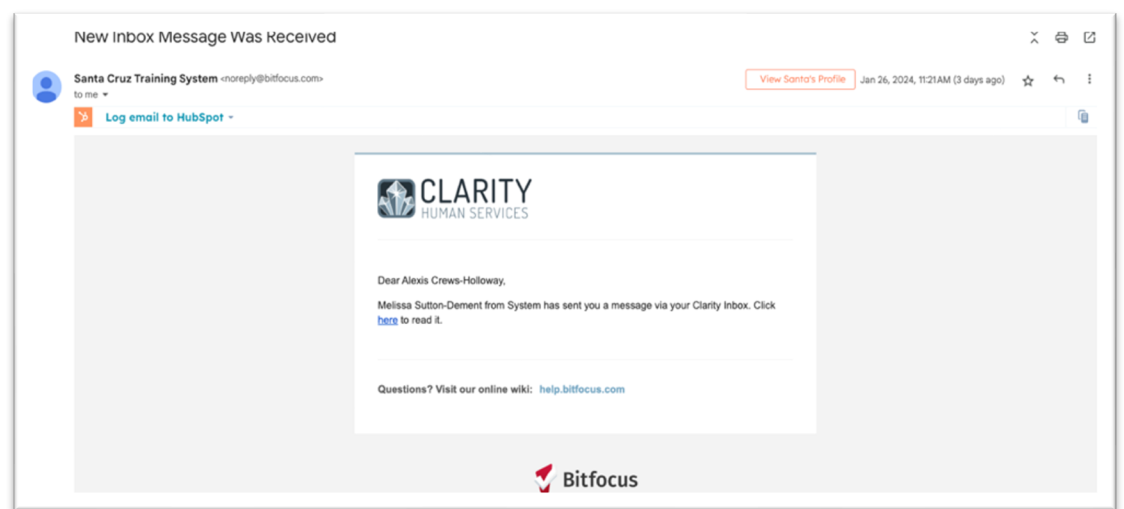
- Confirm the Home Agency of the Connector you wish to transfer the participant's enrollment to.
- Send a secure message in the HMIS to the new Connector requesting they reassign themselves as the Assigned Staff in the participant's CE Enrollment.
- The new Connector will receive an automatic notification in their standard email that they have a new secure message in the HMIS.

**CREATE A MESSAGE**

CoC: Watsonville/Santa Cruz City & County CoC  
Agency: System  
Receiver: Melissa Sutton-Dement

Body:  
Hello Melissa,  
  
Participant BC5A5AA42 and their household members have recently enrolled in an Emergency Shelter you are assigned to. Are you a trained Connector? If so, can you please reassign yourself to their Coordinated Entry enrollment? You do this by editing the assigned staff section in the CE enrollment. You will deselect me and select yourself. You are now their new Connector until they receive another Connector Transfer, move into housing, or exit the program for another qualifying reason.  
  
Please advise if you are **not** a trained Connector and I will maintain management of this enrollment. Thank you!

SEND MESSAGE CANCEL



- Confirm the enrollment has been reassigned to the new Connector. The new Connector should respond to your email request informing you that they have reassigned themselves as the new Connector. If the new Connector is unresponsive after multiple attempts to contact them, reach out to [Monica.Lippi@santacruzcountyca.gov](mailto:Monica.Lippi@santacruzcountyca.gov).

## 2. You are receiving an enrollment transfer from another Connector.

- Review the incoming message from your fellow Connector. You will receive an automatic notification in your standard email that you have a new secure message in the HMIS, as shown in the screenshot above.
- Once you confirm the enrollment transfer is appropriate, navigate to the assigned staff section of the participant's CE Enrollment.



4 DAYS ACTIVE PROGRAM	
Program Type:	Group (2)
Program Start Date:	01/25/2024
Assigned Staff:	Melissa Sutton-Dement <input type="checkbox"/>
Head of Household:	Henry Cowell (He/Him/His) <input type="checkbox"/>

- Send a secure message in the HMIS to the outgoing Connector with an update. You may either reply directly to their initial message or send a new secure message in the HMIS.

- Deselect the outgoing Connector and select yourself. Press “Save Changes.”

## Step 13. Exiting a Participant from Coordinated Entry

A participant should be exited from the Coordinated Entry program for the following reasons:

- They move into any type of permanent housing or enroll into an HMIS housing program.
- They leave the County without the intention to return within 90 days.
- They are in institutional care (hospital, jail, etc.) for longer than 90 days.
- They become deceased.
- They are no longer interested in being considered for any resource within Coordinated Entry.
- They have been unable to be contacted for 90 days (despite multiple contact attempts)

### IMPORTANT NOTES



1. The average length of time a Connector should be working with a participant/household is 3-6 months. You must consult the case at the Connector Collaborative should a case extend beyond 6 months.
2. Participants will be automatically exited from Coordinated Entry if no program-related activity has been recorded after 90 days. Work with your supervisor should an enrollment inadvertently exit.

For more information on Santa Cruz County’s Coordinated Entry System, please visit the [Housing for Health Partnership](#) website.



# Step 14. Locating Paper Forms

While you are encouraged to complete direct data entry into the HMIS, you may also use paper forms for the collection of data.

For paper forms related to the HMIS Connector workflow, please visit the following webpages:

1. [Consumer Information Sharing Authorization](#)
2. [Unable to Obtain Consent Form](#)
3. [Revocation of Consent to Share Data](#)
4. [Standard HMIS Forms for Adults and Children](#)
5. [Housing Needs Assessment and Housing Action Plan](#)
6. [Client Grievance Form](#)

These forms and more information related to the community’s HMIS can always be found at the HMIS Support Website, [santacruz.bitfocus.com](http://santacruz.bitfocus.com).

