# HOMEFIRST Where Homelessness Ends





#### **Training Goals**

To understand and prevent racial bias affecting assessments;

To come away with an in-depth understanding of CES Assessment steps 3-5:

- How to complete the standardized assessment tools (the VI-SPDAT)
- CES HMIS Data Entry
- Note on Enhanced Assessment and Prioritization

#### **Training Agenda**

- •Summary of Access and Initial Assessment training
- •Racial bias and assessments
- •Completing the Standardized Assessment Tools (VI-SPDAT)
- •HMIS Data Entry
- •HUD Touchpoints
- •Case Noting
- •Anonymous entries
- •Collection of Initial Eligibility Documentation
- •Enhanced Assessment
- •Enhanced Prioritization at CES Case Conference

#### **Access Partner Workflow Summary**

If you encounter someone who is homeless, follow these steps:

- 1. Complete Housing Problem Solving Conversation
  - i. Assess for eligibility for CES
    - a. Category 1: Literally homeless
    - b. Category 4: Fleeing domestic violence with nowhere to go
  - ii. Complete a strengths-based conversation to identify housing options other than the homeless services system. Do not continue if options are identified!
- Complete a CES ROI!
- Search in HMIS for: VI-SPDAT within the last year, up to date contact info, and active status on By-Name-List
- 2. Crisis Navigation, including emergency shelter
- 3. Move on to step three, the Standardized Assessment Tool (VI-SPDAT) only if necessary. When is this necessary?

#### **Access Partner Process Summary**

Remember to always be Trauma-informed!

- Use information gained throughout the process
- Tailor the assessment order and pace to the individual's needs
- Relay information in warm-handoffs as needed

#### **Racial Bias in Assessments**

The VI-SPDAT consistently leads to racial inequity:

Studies across the U.S. have found that being white is consistently a predictor of having a higher score than other groups, regardless of actual life circumstances.

This means that Permanent Supportive Housing is <u>more likely</u> to go towards someone who is white than black with the same vulnerabilities if the system uses the VI-SPDAT.

The phrasing of the questions as written can mean different things to people with different backgrounds, especially if there is a lack of trust between the interviewer and interviewee.

#### **Racial Bias in Assessments**

Therefore, it is critically important to:

- introduce, rephrase and reframe questions based on the situation:
  - Remind people that answers will <u>not</u> be used to screen people out of housing opportunities, and will remain confidential within HMIS;
- take into account trauma factors in conducting the Assessment; and
- whenever possible ensure a trusting and safe environment for the Assessment.

#### A Note About Order...

- Workflow can be changed depending on participant needs, agency intake processes, and situational context.
  - Sometimes you'll need to start by enrolling them, sometimes they're already enrolled
  - The VI-SPDAT can be done on paper then entered, or entered live into the system
  - It may make sense to collect initial eligibility documents throughout the interview

#### CES Assessment Step 3: Standardized Assessment Tool

The VI-SPDAT is the Standardized Assessment Tool that is used to assess each client's level of vulnerability and will determine where they fall within the Coordinated Entry By-Name-List. Vulnerability Index Service Prioritization Decision Assistance Tool

#### Before Beginning the VI please explain the following:

- The following questions can be perceived as personal and invasive, but it is important that they answer them with complete honesty.
- Emphasize that these questions are not meant to judge the client in any way, they are used to rate vulnerability and eligibility for services.
- Refusal to answer questions may directly impact qualification for services

- Never disclose the VI-SPDAT score to the client
- Do not promise placement or estimate length of time before placement
- It is never guaranteed that a client will enter a specific program
- To protect the dignity and the confidentiality of the client avoid completing the assessment in public spaces
- Focus on getting the client to use yes or no answers to complete the assessment in a timely manner and to avoid triggering a negative emotional response



Three versions of the tool used, corresponding to each CES population:

- Individuals VI-SPDAT
- TAY VI-SPDAT
- Family VI-SPDAT

Let's dive into the questions!



CES Assessment Step 4: HMIS Data Entry

#### **CES Program Criteria**

- **CES-Individuals:** All single adults over the age of 24 are enrolled individually as Head of Household.
- CES-Families: Enroll only the Head of Household for each family. Families must have minor children in their custody more than 50% of the time to qualify for family enrollment. Maximum of 2 adults (age 18+)– this could look like 1 parent and 1 adult child, or 2 grandparent, etc.
- **CES-TAY:** Enroll Transitional Age Youth between the ages of 18-24. (*If the participant is expected to turn 25 within the next 6 months, then enroll into* **CES-Individuals.**)

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#### **Enrollment Search**

**1: Quick Search:** Enter the client's name into the quick search bar to see if they already have an existing case within the CES HMIS System.

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### **Enrollment Search**

2: Dashboard Search: Enter the client's name into the dashboard search bar to see if the client has ever been in CES.

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Part 3: Search/Enroll-Search within the HMIS enterprise by clicking on the Search Enroll Participant icon now located in the tool bar on the left side

### **Enrollment Search**

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Add New Participant- If you do not find any previous record of the participant then click 'Add New Participant' to create a new record

#### ✓ Participants & Households **Check Site Duplicates** Search/Enroll Existing Participant Add New Participant Add New Participant(s) View/Edit Demographics **Dismiss Participants Dismiss Participants by** Date Add/Edit Families

### **Enrollment Search**

First Name \*

Middle Name

Last Name \*

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Suffix

--Select-- Y

Name Data Quality (HUD) \*

--Select--

#### **Anonymous Entry**

Use this process when a participant does not wish to enter their identifying information into HMIS, or is currently fleeing intimate partner violence (domestic violence).

Follow Sonoma County HMIS Anonymous Client Entry Guide for more details:

https://sonomacounty.ca.gov/Main%20County%20Site/General/Sonoma/Sample%20Dept/Divis ions/Housing%20Authority/Services/A%20Service/\_Documents/How%20to%20Anonymously% 20Enter%20a%20Client%20in%20HMIS%20.pdf

#### **Anonymous Entry**

#### Enter client and complete initial demographics

First Name = Client

Last Name = Refused

Name Data Quality = Client Refused

SSN = 123456789

SSN Data Quality = Client Refused

DOB = 01/01/ up or one year from real birth year

DOB Data Quality = Approximate

Gender = Enter as normal

Race = Enter as normal

Ethnicity = Enter as normal

Veteran Status – Client Refused

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#### **HMIS Data Entry**

#### **NOTE:** No data entry can occur without a valid CES ROI uploaded!

\*exception if the client is anonymous

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#### **Uploading CES ROI**





#### **HUD TouchPoints**

- Most programs serving people experiencing homelessness require HUD Entry Assessments (also called HUD Touchpoints).
- The HUD Entry Assessment allows collection of basic data regarding the client's current homeless situation. This will give interviewer insight regarding the client's current situation and can help guide the process.
- HUD Entry Assessments allows service providers to track a client's homeless history on their HMIS dashboard.
- Large gaps in HUD Touchpoints can indicate a break in homelessness, incarceration, or residing outside of the area



#### HUD Start vs Update Touchpoints

- HUD Start touchpoints:
- New to system or new enrollment
- HUD Update touchpoints:
- Re-assessment on existing enrollment
- Change in income or status

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#### **Enter the VI-SPDAT**

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#### **Enter the VI-SPDAT**

Sono - VI-SPDAT for Single Adults for Jones, Fake John on

Populate with previous response:

-- Select --

Identifier: Auto-generated when Save

Make sure the date matches the date of the enrollment.

If you are updating with a new assessment on an existing case, you can populate with a previous VI-SPDAT's responses- but still need to ask each question.

#### **Case Noting**

Enter case note whenever you encounter the client or provide a service related to CES.

Case noting triggers a client to be 'active' in CES. If there are no case notes or service touches in HMIS for 90 days, the client becomes 'inactive' and will not be up for referrals until they have touched the system again.

If completing a new VI-SPDAT for someone already enrolled, the case note provides crucial information of updates and why you are completing a new assessment!

#### **Case Notes Should Include:**

- Monthly income and source (employment, SSI/SSDI, pension, etc), if different than enrollment
- When did their homeless situation begin?
- Does the client have a service dog or pet?
- Include contact information of any existing agencies/case managers with whom they may already be working
- Include any information that may directly impact placing this person into programs (PC-290 Status disqualifies clients from certain programs)
- Does the client require an interpreter? Why (language, disability, etc)?
- Include any observations regarding their vulnerability not reflected in the VI-SPDAT.

This is where you, as a service provider, can indicate if you feel there are any gaps in the information provided

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**Step 1:** Enter the CE case note touch point. On EtO HMIS, it is 'Recent Coordinated Entry Contact Form'.

**Step 2:** Enter regular CE case note on the first tab of the case note touch point. If contact was made with participant -

Case Notes and Follow Up	St Joseph's Info Coordinated Entry Event (Referral Details)	
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Service record notes		

-then mark 'yes' for contact made with participant. If attempt to contact ended without speaking with participant or with secondary contact, mark 'no'.

-Ignore the other tabs.

**Step 3:** After entering regular CE case note, note any reasonable accommodations requested. If participant has documentation to support the need of a reasonable accommodation,

Reasonable accomoda	ation request made?		
○ Yes			
○ No			
Clear Selection			

Reasonable accomodation request details	
If reasonable accommodation request is disability related does client have suppo	rting documentation?

accommodation, answer yes to that question. Any reasonable documentation available during appointment should be scanned and uploaded to the participant's dashboard.

○ Yes

## **Step 3:** Save your case note

#### Previous Page





### CES Assessment Step 5: Collection of Initial Eligibility Documents

#### **Collection of Initial Eligibility Documents**

After completing HMIS Data Entry, scan and upload any initial eligibility documentation into the client's HMIS dashboard

CES Release of Information (ROI)/Program Agreement – even if you don't have anything else to upload, you <u>must</u>upload this or HomeFirst will delete the client profile

#### **Collection of Initial Eligibility Documents**

"Eligibility" – referring to eligibility for eventual housing program

Upload documents available at point of assessment, and as staffing time permits, ongoing

Examples:

- ID and Social Security Card
- Homelessness verification letters
- Documentation of disabling condition from a qualified medical provider, or SSI/SSDI letter
- Veteran status verification (DD214, VA disability verification)
- Prison release paperwork
- Income verification

#### **Uploading Scanned Documents**





#### Summary of Workflow (order can be changed)

- 1. Complete Housing Problem Solving Conversation
  - i. Assess for eligibility for CES
  - ii. Complete a strengths-based conversation to identify housing options other than the homeless services system. Do not continue if options are identified!
- Complete a CES ROI!
- Search in HMIS for: VI-SPDAT within the last year, up to date contact info, and active status on By-Name-List
- 2. Crisis Navigation, including emergency shelter
- 3. Complete the Standardized Assessment Tool (VI-SPDAT)
- 4. HMIS Data Entry:
  - i. Create participant profile if none is already created
  - ii. Complete the Entry HUD Touchpoint in the relevant CES Program
  - iii. Enter the VI-SPDAT
  - iv. Enter a case note
- 5. Upload the CES ROI and Initial Eligibility Documents

### Enhanced Assessment and Prioritization

Scores do not always reflect a client's vulnerability! Enhanced Assessment and Prioritization allows additional documented information to be presented at Case Conference to assist with more accurately prioritizing the client for openings with the level of assistance they truly need.

More to come!

# HOMEFIRST Where Homelessness Ends



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