Butte Countywide Homeless Continuum of Care

Homeless Management Information System / Coordinated Entry Committee
Monday, February 6, 2023 1:00 p.m. – 3:00 p.m.
Butte County Employment and Social Services – Zoom Virtual Meeting
Zoom Link: https://us02web.zoom.us/j/84862101734?pwd=T1k4KytnZXIyTEdham5WV1RNaDZKdz09
Phone: (669) 900-9128 Meeting ID: 848 6210 1734 Passcode: 219152

HMIS/CE COMMITTEE MEMBERS (CHO Administrator, or designee):

Angie Little, HACB
Codie McCormack, Caminar
Nancy Jorth, Youth for Change
Susan Wilson, Safe Space
Stephan Spirk, CAA
Yesenia Gallgos, CHAT
Cynthia Pesheck, Ampla
Keesha Hills, OSCIA
Shelly Watson, Jesus Center
Tracey Gilliham, Butte 211
Rick Jackson, BCDBH
Carolina Cruz, Catalyst
Debbie Villasenor, Consultant
Elisa Rawlinson, DESS HHOME
Karen Ramirez, True North Housing Alliance
Annie Terry, Oroville Rescue Mission
Sara Sweaney, Nation's Finest
Nick Fashing, DESS APS
Meagan Smith, Northern Circle Indian Housing Authority
Rachel DeLeon, DESS

First Chairperson: Elisa Rawlinson, DESS HH **Second Chairperson:** Sarah Frohock, BCDBH

AGENDA

1. Call to Order	Elisa Rawlinson
2. Introductions/Agency Updates	All
3. LSA and SPM update	Elisa Rawlinson
4. Internal Client Referral System a. HMIS training/demonstration	Elisa Rawlinson
5. Update on CHO MOUs	Elisa Rawlinson
6. Full Share versus Basic Share – ***DISCUSSION***	All
7. End User background checks - ***DISCUSSION***	All
8. Next Meeting: Monday, March 13, 2023; 1:00 – 3:00 p.m.	Elisa Rawlinson
9. Adjourn	Elisa Rawlinson

Public Listing: if "Public," staff members at other agencies can refer clients to the program. If "Agency," only the agency's staff members can refer clients to the program. If "None," no one can refer clients to the program.

Introduction to Making Referrals

The ability to refer clients to programs with or without eligibility criteria, match and prioritize those referrals based on specific criteria, and manage referrals across multiple programs is a key functionality of Clarity Human Services and an essential component of coordinated entry process management.

There are two main methods by which clients can be referred to programs. The first is direct referrals, where a client is referred directly to one or more programs. The other involves the client first being referred to a *Community Queue*, where referrals will be reviewed for program eligibility and prioritization by a designated staff member.

Referrals can be made from two different locations in the client record:

- The *Referrals tab*: when the user wants to directly refer the client to a specific program regardless of eligibility criteria
- The *Assessments tab*: when the user wants to directly refer the client to a program based on eligibility criteria or refer a client to a *Community Queue*

Agency and Program Configurations for Referring to Programs

When referring a client to a program, either directly from the *Referrals tab* or *Assessments tab*, or by re-assigning from the *Community Queue*, certain agency and program configurations must be in place for a program to show up as a referral option:

- **Continuum of Care**: *The Continuum of Care* in the *Agency Overview* must be the same for the referring and referred-to agency (the system does not look at the *Continuum of Care* field for the program).
- **Public Listing**: *Public Listing* must be set as either “Public” or “Agency” for the program being referred to. If set as "Public," the program will populate as an option for all agencies. If set as "Agency", it will only populate for staff members at the agency (or switched into agency). If an

"Agency", it will only populate for staff members at the agency (or switched into agency). If an agency has no programs with *Public Listing* configured to be shared with the agency or publicly, it will not populate the drop-down menu.

- **Eligibility**: Eligibility must be toggled on for the program being referred to (requirements added in the Program Eligibility section will determine if a program displays in the Eligible or Ineligible section from the Referrals tab. For more information see, Program Eligibility).
- **Sharing**: Service/Programs/Assessments Placed must be set to "Basic Shared" or "Full Shared" for the program being referred to.

The chart below displays which settings impact the referral options in each section of Clarity Human Services.

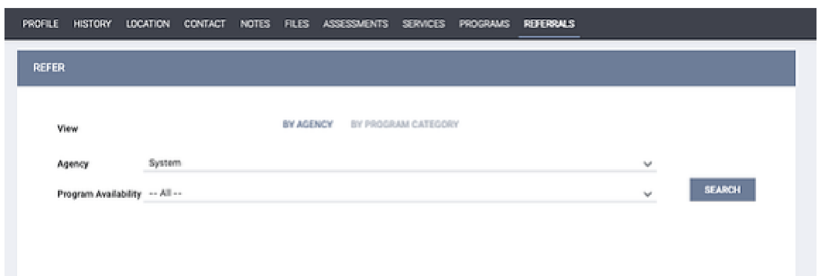
	Assessments Tab	Referrals Tab	Re-Assign from Community Queue
Continuum of Care	x	x	x
Public Listing	x	x	
Eligibility	x		
Sharing	x	x	

Direct Referrals from the Client Referrals Tab

There are two ways to directly refer a client to a program: from the client record [*ASSESSMENTS* tab] and from the client record REFERRALS tab. Direct referrals made from the REFERRALS tab allow users to refer clients to specific Programs, regardless of program availability or if the client meets eligibility criteria.

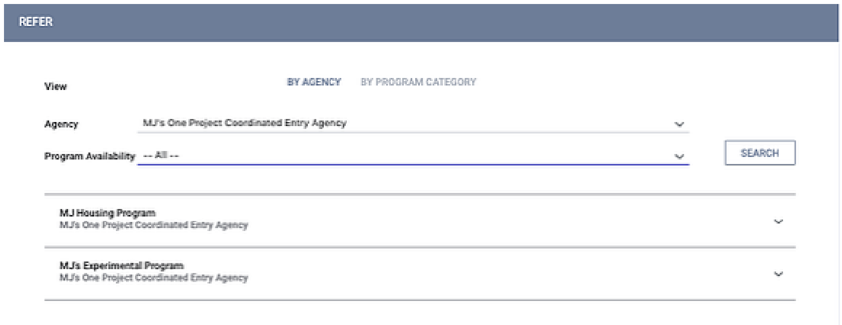
> **Note**: *Certain configurations must be in place in order for a program to display as a referral option. See [Introduction to Making Referrals] for more information.*

To create a referral from the *Referrals tab*, navigate to the client record, and click the *REFERRALS* tab. You'll see two options for referral methods: *BY AGENCY* or *BY PROGRAM CATEGORY*.



Refer By Agency

Select *BY AGENCY* if you want to refer the client to a specific Program. Selecting the agency from the dropdown menu will generate a list of Programs (regardless of eligibility) within that agency.



You can narrow the search by Program Availability. Program availability is managed in the Global *REFERRALS* tab and is an alternate way for program managers to indicate availability rather than bed count, as reflected in the *Attendance Module*.

Refer By Program Category

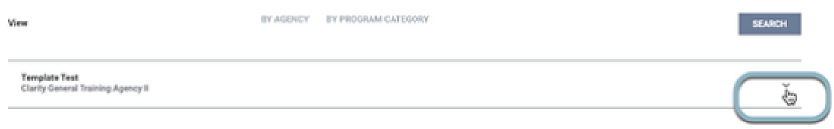
Select *BY PROGRAM CATEGORY* if you want to refer the client to a type of Program (e.g. permanent housing, emergency shelter, etc.). Selecting a Program category from the dropdown menu will generate a list of all Programs across agencies that match the Program type and Program availability.

> **Note**: *The Programs that populate by program type are based on the [Program Type field](#).*

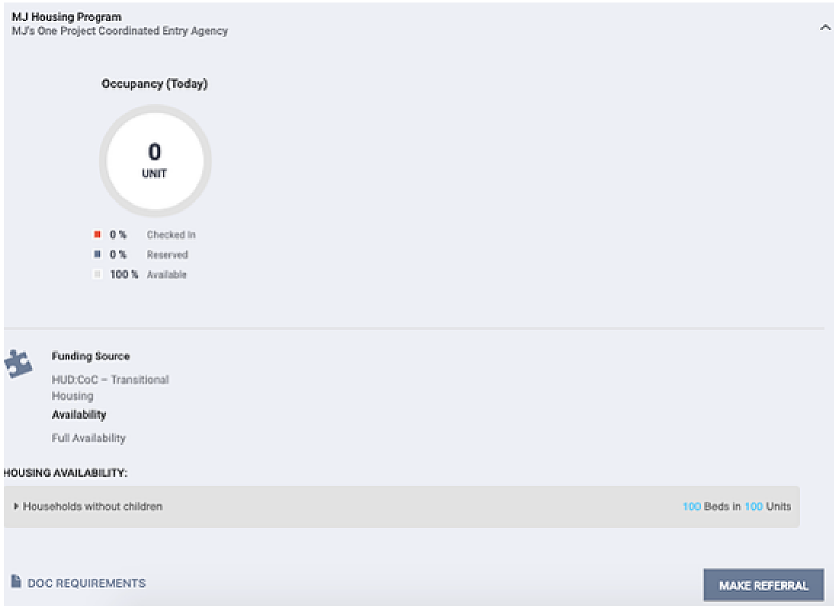
Regardless of whether you select *BY AGENCY* or *BY PROGRAM CATEGORY*, the remaining steps of generating a referral will be the same.

Program Referral Details

After you select one of the *View* options and click SEARCH, select the expand icon for the Program to which you would like to refer the client.



Program details, including available openings based on the *[Attendance Module](#)*, will be displayed.



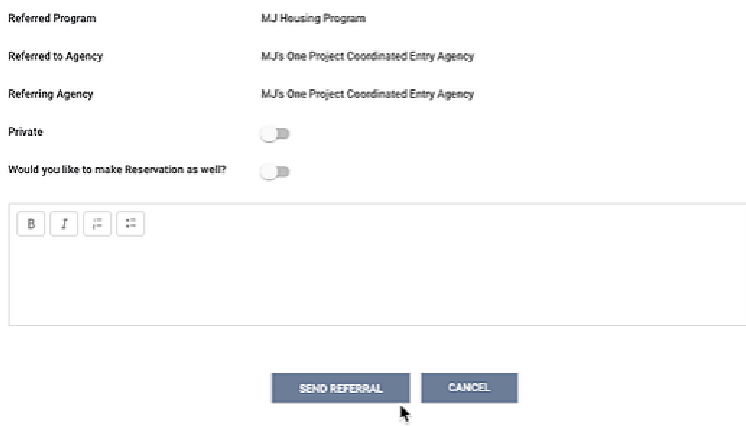
Clicking *DOC REQUIREMENTS* will display in a separate window any documentation requirements configured in [Agency Management](#) for the program (if applicable).

Click *MAKE REFERRAL*.

Send Referral

After clicking *MAKE REFERRAL*, you can review the details of the referral (referred Program, referred-to agency, and referring agency) and make additional configurations before sending the referral, including [making a reservation](#). Information about these and other referral configuration options can be found in [Editing Referrals](#).

> **Note**: *The referral will* ***not*** *be sent until you click SEND REFERRAL.*



Once you click *SEND REFERRAL*, the referral will be saved in the client record. Notification to the referred-to agency will depend on the system Referral Settings. You'll be directed to *Referral: Edit* where you'll have additional referral configuration options.

Sharing Client Data within the Record: Section by Section

Throughout sharing settings, there are five main sections of sharing configuration: *Clients Created*, *Service/Programs/Assessments/Events Placed*, *Notes*, *Files*, and *Location*. The sharing of data created by an agency in each section of the client record is controlled by that agency's sharing settings for these components. The table below defines the client record components impacted by each setting.

Sharing Setting	**Record Component**
Clients Created	Client record, client profile
Service/Programs/Assessments/Events Placed	History, services, program enrollments, assessments, Coordinated Entry Events, referrals, ROI, Assigned Staff
Notes	Notes (entered from the *Notes* tab or as Program Notes within an enrollment)
Files	Files (entered from the *Files* tab or as Program Files within an enrollment)
Location	Contact, Location

The Standard Sharing Settings

In *Sharing Groups*, as well as *Departments* and *Agency Exceptions*, the sharing settings for record components have three standard options: "Not Shared," "Basic Shared," and "Full Shared."

Not Shared: data entered by that agency for that record component is not shared.

Full Shared: data is fully shared.

Basic Shared: allows staff to see that data has been entered, but, for the most part, they're unable to edit or view additional details of the data.

> **Note**: *The chart below describes how the system records and saves client data. Users' ability to view, edit, and delete that data depends on sharing settings and access roles.*

Record Component	Not Shared	Basic Shared	Full Shared
Clients Created	Client records created by staff members at my agency do not show up in the search results of staff members at other agencies.	Client records created by my agency will be visible in client search results for staff members at other agencies, but they will not be able to click on it to access the full record.	Client records created by staff members at my agency are accessible to staff members at other agencies, including data entered in the *Client Profile.*
Service/Programs/ Assessments/ Events Placed	Service, enrollment, assessment, Coordinated Entry Event, referral, and ROI data entered in client records by staff members at my agency are not accessible to staff members at other agencies.	Service, enrollment, assessment, Coordinated Entry Event, referral, and ROI data - but not full details - entered in client records by staff members at my agency are accessible to staff members at other agencies, but cannot be edited, regardless of access role.	Service, enrollment, assessment, Coordinated Entry Event, referral, and ROI data - including full details - entered in client records by staff members at my agency are accessible to staff members at other agencies.

Notes	Notes entered in client records, either from the *Notes tab* or *Program Notes* (the *Notes tab* within an enrollment) by staff members at my agency are not accessible to staff members at other agencies.	Notes - but not their full details - entered in client records, either from the *Notes tab* or *Program Notes* (the *Notes tab* within an enrollment) by staff members at my agency are accessible to staff members at other agencies.	Notes - including full details - entered in client records, either from the *Notes tab* or *Program Notes* (the *Notes tab* within an enrollment) by staff members at my agency are accessible to staff members at other agencies.
Files/Forms	Files and forms entered in client records, either from the *Files* tab or the *Program Files* (the *Files* tab within an enrollment) by staff members at my agency are not accessible to staff members at other agencies.	Files and forms entered in client records, either from the *Files* tab or *Program Files* (the *Files* tab within an enrollment) by staff members at my agency are accessible to staff members at other agencies, but cannot be edited or deleted, regardless of the staff member's access role.	Files and forms entered in client records, either from the *Files* tab or *Program Files* (the Files tab within an enrollment) by staff members at my agency are accessible to staff members at other agencies and can be edited and deleted, if the staff member's access role permits.

Location/Contact	Location and contact data entered in client records by staff members at my agency are not accessible to staff members at other agencies.	Location and contact data - but not full data - entered in client records by staff members at my agency are accessible to staff members at other agencies but cannot be edited or deleted, regardless of the staff member's access role.	Location and contact data entered in client records by staff members at my agency are accessible to staff members at other agencies and can be edited and deleted if the staff member's access role permits.