CES in HMIS – a Quick How To

For HMIS Users referring TO the Coordinated Entry System:

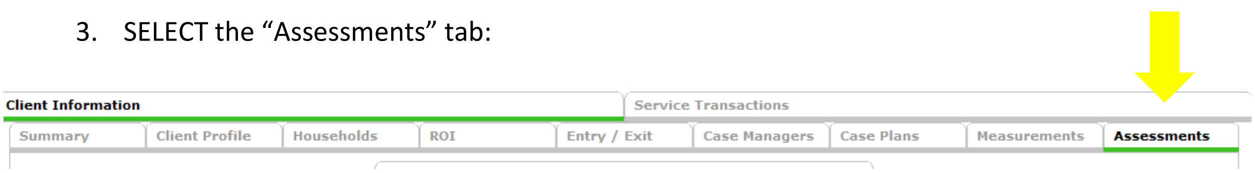
1. START with searching for the client in ClientPoint. If the Client is not in HMIS, then take the appropriate steps of adding a new record. If the Client is in HMIS, click on their name to pull up their Client Record.
    a. Data Quality Bonus Points: You've taken a few brief moments to review information on the Client Profile page and confirmed this information is complete and up-to-date.
2. Under the Client Information tab, SELECT the ROI tab:

CLICK "Add Release of Information". Select all Household members covered by the ROI. Select your provider, which is your **AGENCY** (not specific program).

>>Release Granted>>Start Date (date the ROI was completed/signed, should be same date as assessment)>>End Date (one year after ROI was signed)>>Documentation (select appropriate option)>>Witness (select appropriate answer)

CLICK "Save Release of Information"

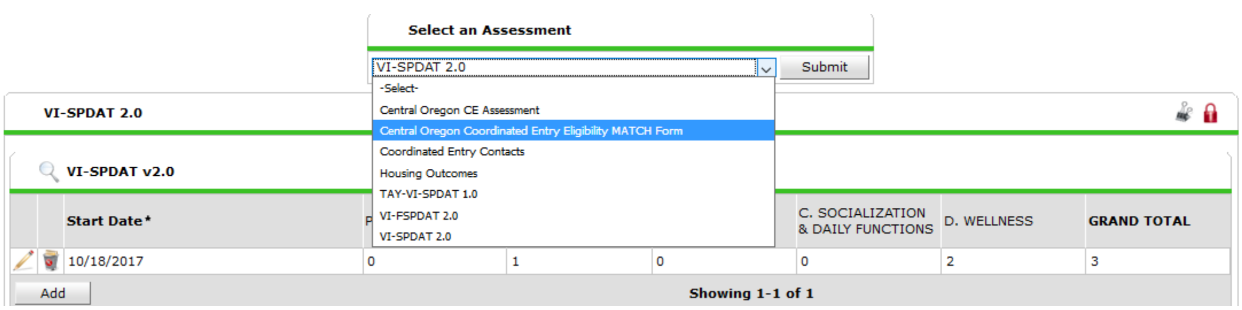
3. SELECT the "Assessments" tab:



SELECT the appropriate VI-SPDAT (VI-SPDAT=Individuals; VI-<u>F</u>SPDT= Families; TAY-SPDAT= Youth)

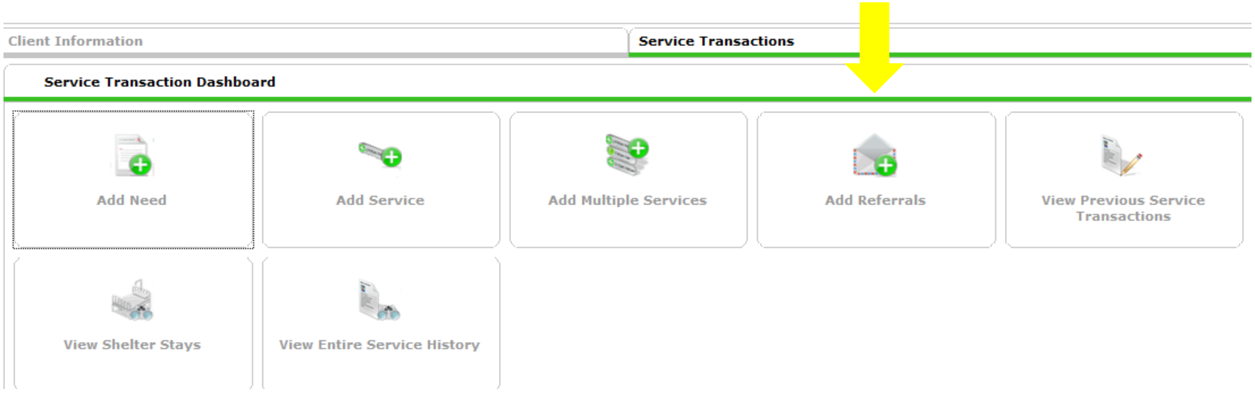
CLICK "Submit" >>Click "Add".

Return to the Assessment drop-down and complete the second assessment: "Central Oregon Coordinated Entry Eligibility MATCH Form":

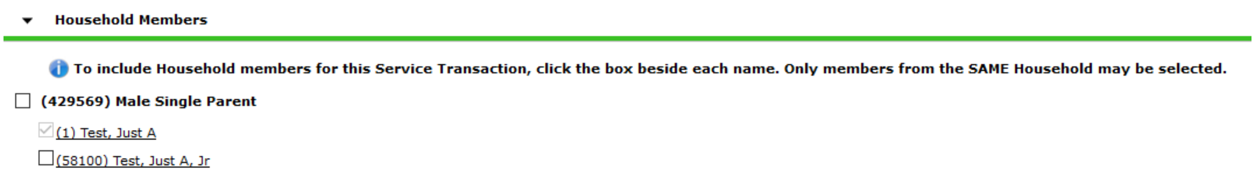


Have you completed the correct SPDAT and the MATCH assessment?
If so, proceed to making the referral…

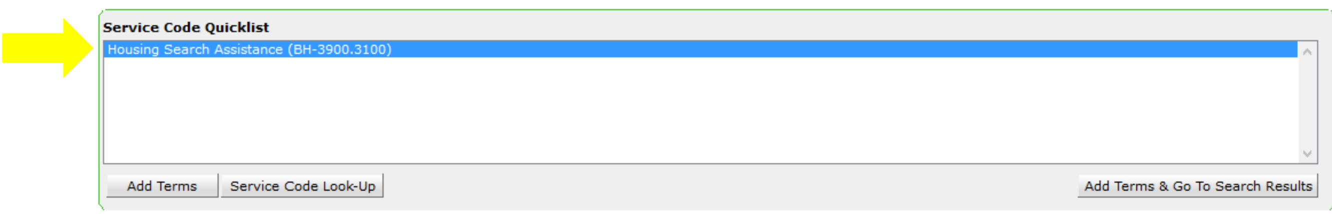
4. Under the Service Transaction tab, SELECT the “Add Referrals” button:



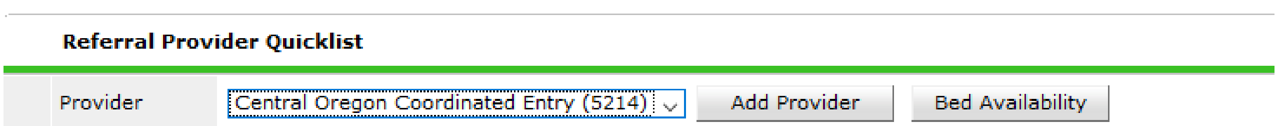
CHECK the household members tied to the referral:



SELECT the correct Service Code: “Housing Search Assistance”, then CLICK “Add Terms”



From the Referral Provider Quick List, CHOOSE the “Central Oregon Coordinated Entry Provider” from the drop down Menu:



Under Referral Data, answer the following questions. **<u>Then SELECT “Save All” at the bottom of the page.</u>**