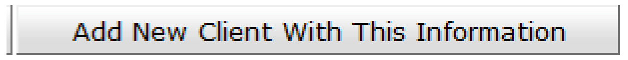
CES in HMIS – a Quick How To

For HMIS Users referring TO the Coordinated Entry System:

1. START with searching for the client in ClientPoint.
2. If the Client is **<u>NOT</u>** in HMIS, then please add them by doing the following:
   a. If after searching for Client in ClientPoint there are no records, add client by clicking "Add New Client With This Information":



   b. Click on the "Client Profile" tab and add the demographic information of client by clicking on the pencil next to "<u>Client Record</u>" and "<u>Client Demographics</u>":

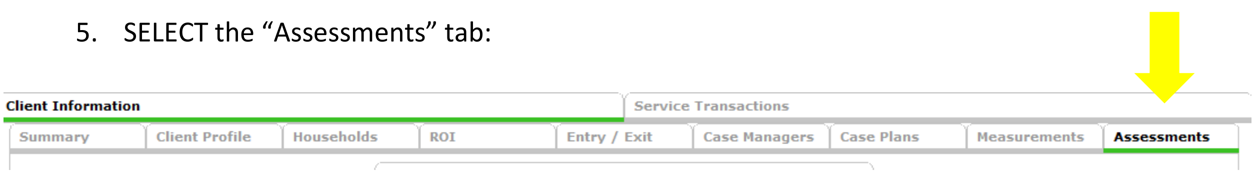
   c. Once the demographic information is entered, jump to Step 4.
3. If the Client **<u>IS</u>** in HMIS, click on their name to pull up their Client Record.
   a. Data Quality Bonus Points: You've taken a few brief moments to review information on the Client Profile page and confirmed this information is complete and up-to-date.
4. 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 (agency)**.

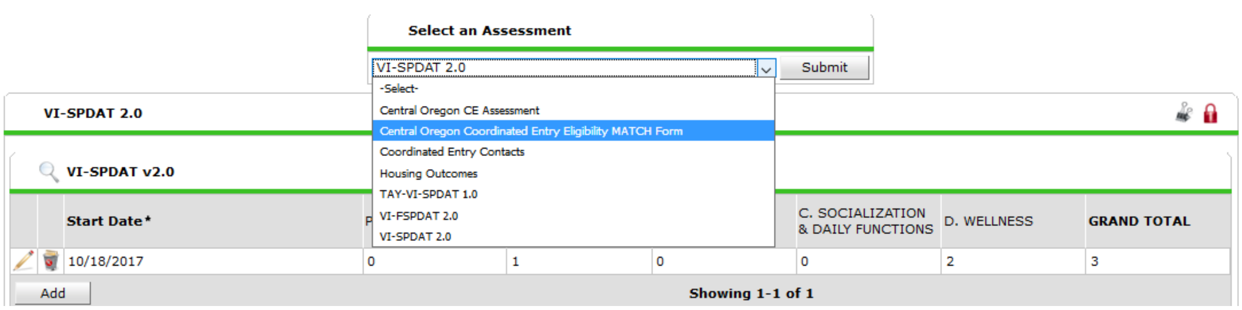
>>Release Granted>>Start Date (date the ROI was completed/signed, should be same date as assessment)>>End Date (one year after ROI was signed)>>Documentation (select appropriate option)>>Witness (select appropriate answer)

CLICK "Save Release of Information"

5. SELECT the "Assessments" tab:



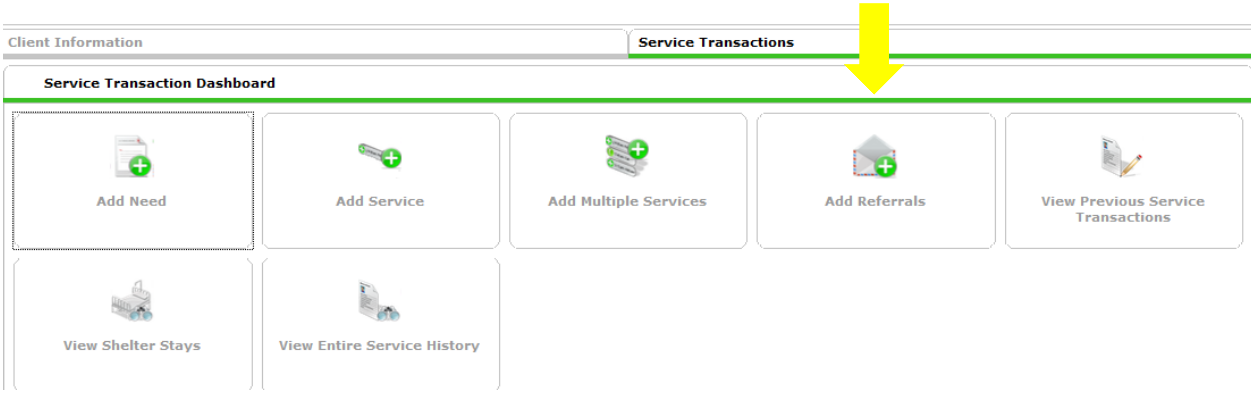
Select the assessment: "Central Oregon Coordinated Entry Eligibility MATCH Form". Click "Submit" to see the questions.



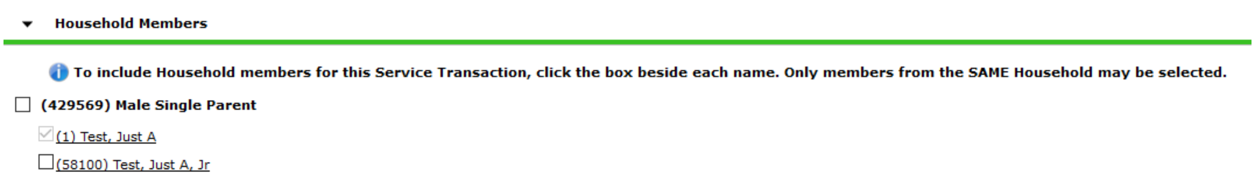
Once completed, return to the Select an Assessment dropdown. SELECT the appropriate VI-SPDAT (VI-SPDAT=Individuals; VI-FSPDT= Families; TAY-SPDAT= Youth). CLICK "Submit" >>Click "Add".

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

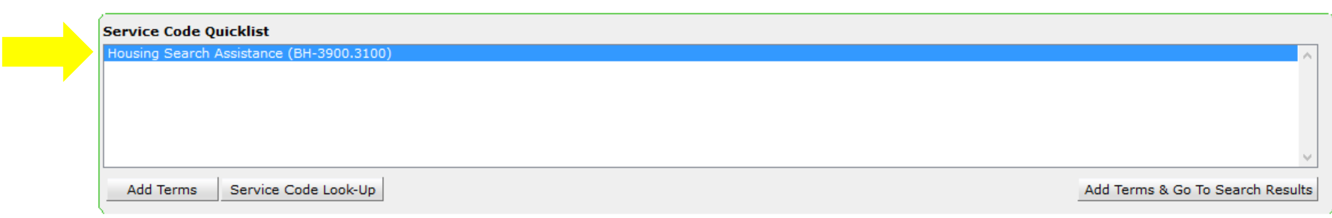
6. Under the Service Transaction tab, SELECT the "Add Referrals" button:



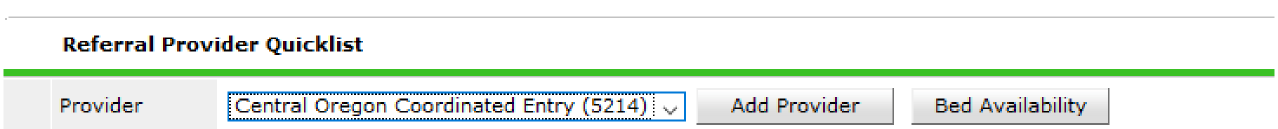
ONLY the Head of Household needs to be checked for the referral:



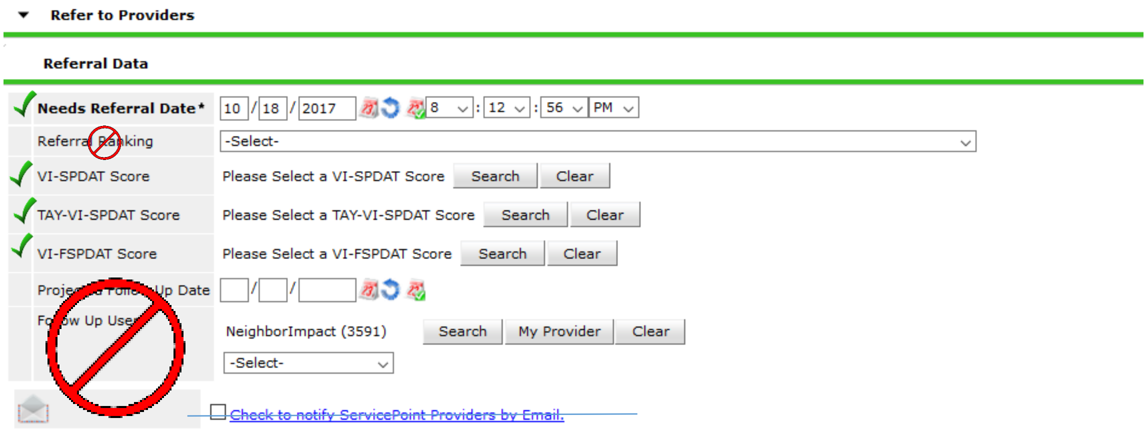
SELECT the correct Service Code: "Housing Search Assistance", then CLICK "Add Terms"



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



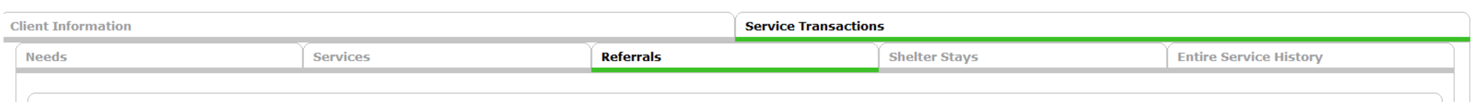
Under Referral Data, answer the following questions.



<u>SELECT "Save All" at the bottom of the page.</u>

To check ensure that a referral has been made:

1. Click on the "Service Transactions" tab, then click on the "Referrals" tab:



2. You should see all referrals made for this client on this tab. Your referral will have "Central Oregon Coordinated Entry" as the Referred To provider.