Coordinated Entry in Clarity

Learner Guide

A summary of Coordinated Entry workflows in Clarity, how to enroll clients, and how to manage assessments and services for CE Projects.

About Clarity

Clarity is a Homeless Management Information System (HMIS), that collects and stores comprehensive, individual-level data about individuals who utilize the service system.

Clarity is a powerful tool that connects your community's most vulnerable populations to resources while streamlining workflows, and provides analytics for informed decisions.

Clarity allows you to:

Track clients, services and referrals

This feature allows organizations to maintain detailed records of individuals and families experiencing homelessness, including their service needs and history.

Manage cases

Clarity HMIS offers tools that enable case managers to create and maintain comprehensive case files for each client.

Generate reports

Clarity offers strong reporting capabilities for monitoring program effectiveness. You can generate reports on client demographics, service utilization, outcomes, and more.

Explore:

About Coordinated Entry

- Identify, assess, and connect clients to flexible housing and service options in their community.

Learn more

Adding Clients

- Create client profiles to understand their needs and manage client information in Coordinated Entry.

Learn more

Project Entry Workflow

- For accurate reports, review how to effectively register a client in a Coordinated Entry in Clarity.

Learn more

Managing CE Services

- Certain assessments and services may vary in a Coordinated Entry. Become familiar with the nuances of CE.

Learn more

About Coordinated Entry

Managing Coordinated Entry

Get familiar with Coordinated Entry

Whether you are new to CE or looking to enhance your knowledge of the process, this section provides a helpful summary of the fundamentals of CE and how it can be effectively implemented.

CE Workflow in Clarity

1. **Switch** to a Coordinated Entry agency
2. **Find or add** a client or Head of Household
3. **Enroll** a client to a Coordinated Entry project
4. Add a Coordinated Entry event in **Services**
5. Fill out **assessments**, such as the Current Living, or other in place
6. Make a **Referral** to Community Queue

Review the ***Coordinated Entry Policy Brief*** *to find more information on how the CE process.*

What is Coordinated Entry?

- **Coordinated Entry** (CE) is a process that aims to ensure individuals experiencing homelessness have fair and equal access to housing and homeless assistance resources.
- Through CE, you can promptly identify, assess, and connect individuals to flexible housing and service options in their community.

Why Coordinated Entry?

- A Coordinated Entry prioritizes assistance *based on vulnerability and severity* of the service needs.
- CEs ensure that people who need assistance the most receive it in a *timely* manner.
- CE processes provide information about *service needs and gaps* to help communities plan their assistance.

Note: This guide covers the essentials of the course Coordinated Entry in Clarity. Review the training course for a complete overview.

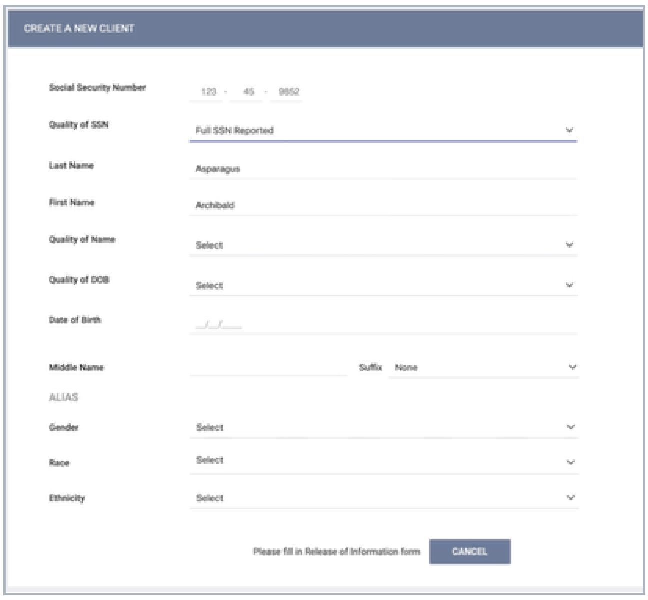
Adding Clients

Managing Coordinated Entry

How to add a new client record

Adding a new client to a CE project is no different than adding new client records in Clarity; fill out all the required fields accurately and provide complete information for consistent quality data.

Adding new client steps



1 Search for existing records

After search combinations are exhausted, you may create a new client file by clicking *Add Client.*

2 Fill out the HUD data points

Populate the Client Search form as completely as possible, including:

- Client's name
- Client's Demographics
- DOB
- Social Security number
- Social Security number data quality
- Veteran status.

3 Complete ROI Form

Update the Release of Information section. This section requires *you* to mention where the ROI or release of information document is stored.

Pro Tip

Clarity allows you to *add contact information* after creating a profile. Select *Contact* from the banner options and add the details.

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Project Entry Workflow

Managing Coordinated Entry

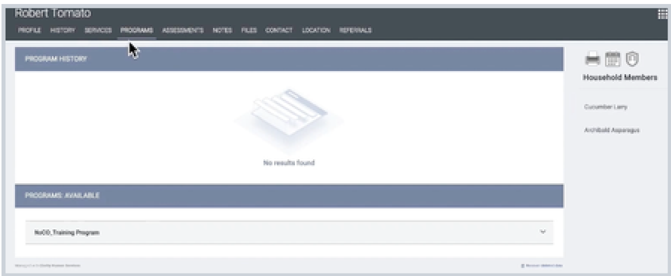
How to enroll clients to CE projects

Enrolling a new client in a CE project may differ from other project enrollments. The information you are required to complete the CE enrollment assessment will depend on the program type you are enrolling your client to.

Project entry steps

1 Search for the client to enroll

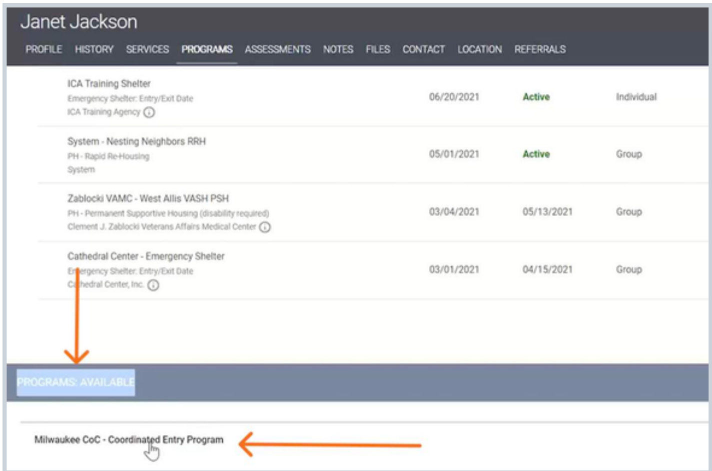
Go to *Search*, and look for the client you want to enroll in a project using the client search function.



2 Select the Coordinated Entry program

Select the Program option from the top menu to reveal the *Available Programs.*

Find the Coordinated Entry Program to use and select *Enroll.*



3 Fill out the CE assessment questions

A coordinated entry-specific project will be shown from the project list. Fill out the CE *Enrollment Assessment* questions.

The first segments to fill out are the Project Start Date and Housing Move-in Date. Be sure to answer all assessment questions for each household member.

Remember

It's essential to switch to the Coordinated Entry "agency" when engaging with the Coordinated Entry workflow.

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Managing CE Services

Managing Coordinated Entry

How to manage CE services

Once a Coordinated Entry project enrollment has been created, you can access the available services, and referrals, and you will also find additional assessments specifically for Coordinated Entry.

Adding a Service

1 Provide services sub-tab

Select the small down arrow to open the service category.

Depending on your agency, some categories may have more than one Service Items as sub-categories.

2 Choose services

Once you have selected the correct service, a window will open where the Service information may be entered.

3 Fill out the required fields

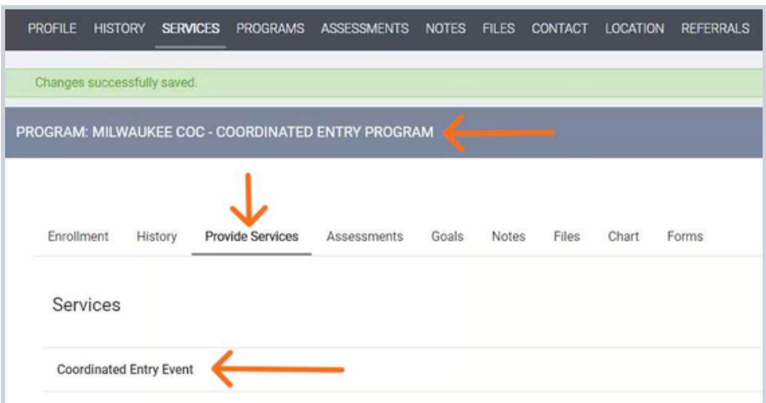
This includes the date, or dates, Services notes, and, where relevant, the ability to document expense information.

Coordinated Entry Services

CE projects prioritize assistance based on vulnerability and severity of service needs.

CoC may prioritize access to services such as:

- Rapid Housing
- Emergency Shelter
- Homeless Prevention
- Permanent Supportive Housing
- Family-Based Setting Support
- Program
- Financial/Rental Assistance
- Voluntary Supportive Services



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