

**Coordinated Assessment System**

**Interim Documentation of Priority Status Process**

Metro Dallas Homeless Alliance has developed a temporary, centralized process for submitting DOPS request which will be in effect until September 30, 2020.

Beginning July 28, 2020, agencies requesting DOPS, will upload necessary documentation to Basecamp and notify CAS Staff using Spiceworks.

MDHA is hopeful this process will not last long as we await the launch of CAS in HMIS.

**Basecamp**

Each agency participating in the Coordinated Assessment System (CAS) has a project folder in Basecamp for their agency. The folder has been labeled “***Your Agency CAS”***. If your agency does not have a folder in Basecamp, contact CAS Staff for access.

All supporting documents needed to complete the Documentation of Priority Status (DOPS) process must be uploaded to the agency’s CAS folder as a zip file (*for instructions on how to create a zip file, click here:* [*https://edu.gcfglobal.org/en/techsavvy/working-with-zip-files/1/*](https://edu.gcfglobal.org/en/techsavvy/working-with-zip-files/1/).

The zip file includes:

* Documentation of Homelessness (outreach letters, third party letters, self-certification, etc.)
* Documentation of Disability (verification of disability form, SSI Award letter, etc.) if applicable
* VISPDAT
* Other applicable documents

Once uploaded to Basecamp, save the zip file as the client’s first initial last name (*example: S. Moore).*

At the end of each week, agencies should continue to communicate housed clients in Basecamp.

**Spiceworks**

After uploading the zip file to Basecamp, send a service request using your agency’s Spiceworks link to notify CAS staff that the file is ready for review. *Not sure of your agency’s Spiceworks link, click here:* [*http://www.mdhadallas.org/wp-content/uploads/2020/07/Service-Request-URL-and-email-by-Agency.pdf*](http://www.mdhadallas.org/wp-content/uploads/2020/07/Service-Request-URL-and-email-by-Agency.pdf)

The Spiceworks ticket should include the request to DOPS.

*Example: CAS Staff, please prioritize S. Moore. Zip File has been uploaded to MDHA CAS.*

Once the ticket has been received, it will be assigned to a CAS Specialist. The CAS Specialist is responsible for:

* Reviewing zip file for accuracy
* DOPS’ing the client and assigning a P-Status
* Completing the Jot Form, generating a receipt which will be sent to the case manager
* Placing the client on the Housing Placement List (HPL)

All communication pertaining to DOPS, will be through Spiceworks.

**Housing Placement List**

It is important to note that the Jot Form operates manually. CAS staff will download the Jot Form on Mondays to merge with the HPL. Because this is a manual process, it takes time to produce a quality list. There may be a one-week delay in seeing the client on the HPL.

The HPL will be uploaded to Basecamp on Thursdays. This excel spreadsheet is broken down into multiple tabs accordingly:

* PSH
* RRH
* Veterans
* Youth
* Housed
* Inactive
* Move On
* Raw Data

Tabs on the spreadsheet, have color-coding:

* White- client was referred for DOPS, but has not been prioritized, case manager should follow up using Spiceworks
* Yellow- client has been referred to a housing program
* Green- client has been prioritized and ready for referral
* Blue or orange- follow up is needed, refer to comments’ column

Clients are placed on the inactive list after not being updated within 90 days or once due diligence has been completed and client cannot be located. CAS Staff may place a client on the inactive list on a case by case basis. Contact will be made with the referring case manager before placing on the inactive list.

Weekly on Fridays, CAS Staff will upload to Basecamp and send a notification to all Basecamp project users email (from Basecamp) a list of clients scheduled to be placed on the inactive list within the 30 days. Case managers are asked to gather updated documents and upload to Basecamp using the instructions provided above.

**Weekly By Name List (BNL) Meetings**

BNL meetings will be held weekly.

All housing projects, street outreach teams, and emergency shelters should attend to advocate for their clients and provide updates.

Housing referrals will be given during the BNL meeting. Before the next meeting, CAS Staff may replace referrals made during the meeting, if the referral give was not a match.

*For example: S.Moore was referred to a PSH project. Client declined housing referral. The PSH project can request a replacement name before the next scheduled meeting.*

Replacement referrals will be made within 24 business hours. To receive a replacement referral, send a request through Spiceworks. The ticket should include the following:

* Name of client being returned
* Reason client is being returned
* Additional information needed to make a positive referral

CAS Staff will copy all DOPS forms to the housing project’s file within 24 hours of making the referral.

**Providing Updates to Referrals**

CAS Staff will create a live document (example Good Docs) which all agencies will be expected to update weekly before the BNL meeting. Agencies who do not provide updates before the meeting, will not receive referrals at the BNL meeting.

**Domestic Violence Process**

The referral process for clients fleeing domestic violence will remain intact until further notice.

**CAS Staff**

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During this process, Stephanie will be working with CAS Specialists as the team lead.

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During this process, Natalie will be working with the HPL and BNL meetings to provide referrals and updates