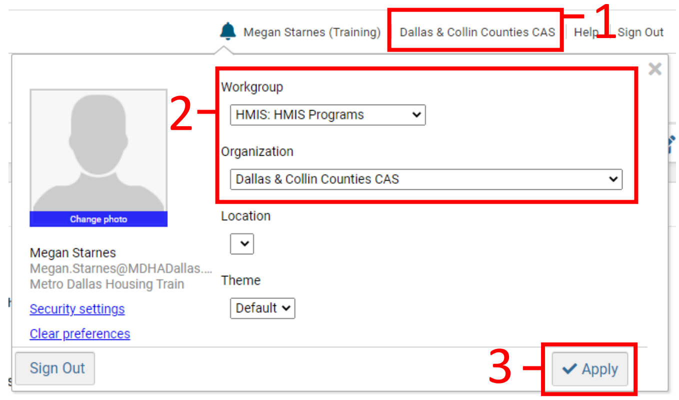
Coordinated Entry Enrollment

1. Confirm your ClientTrack settings



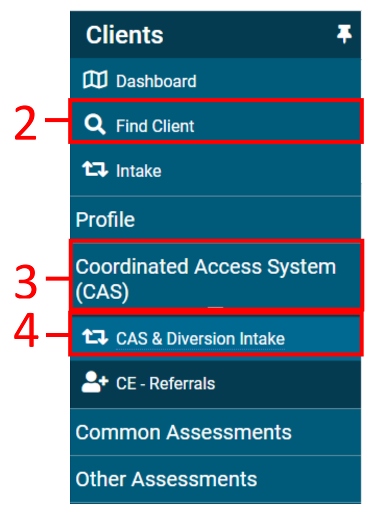
Workgroup: HMIS: HMIS Programs

Organization: Dallas and Collin Counties CAS

Steps:

1. After logging in to ClientTrack, click on your agency name in the top right corner of the page.
2. Use the drop-down menu to change your organization to Dallas & Collin Counties CAS. Confirm your workgroup is HMIS: HMIS Programs.
3. Click Apply.

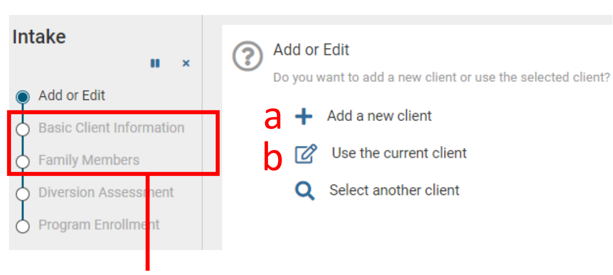
2. Complete the CAS & Diversion Intake



Where: Clients Workspace

Steps:

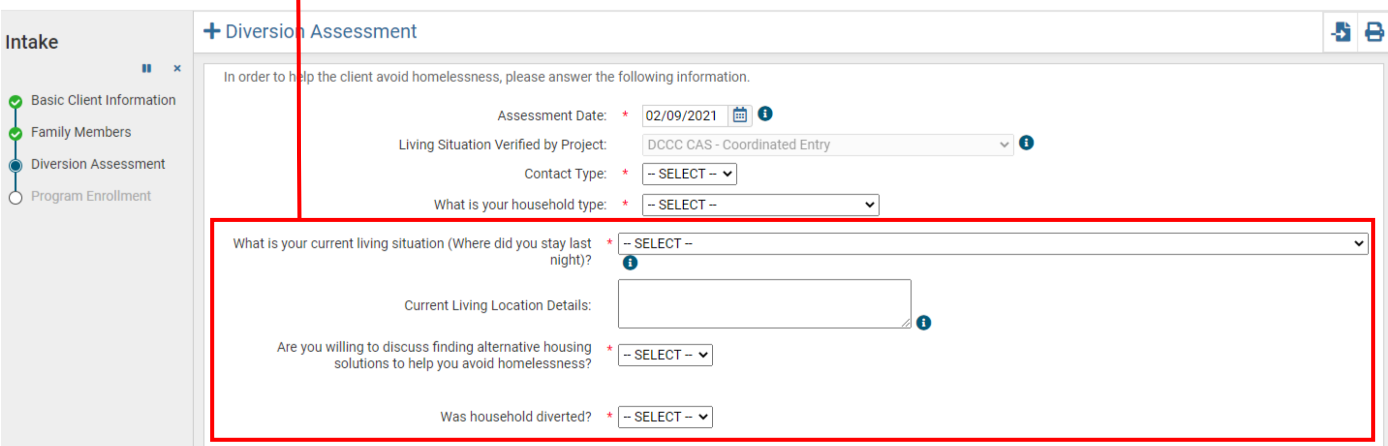
1. Navigate to your Client's Workspace.
2. On the menu, search for Client to confirm no duplicates
3. On the menu, click Coordinated Access System (CAS)
4. Choose CAS & Diversion Intake
   a. Add a new client if your client does not have a record in HMIS
   b. Use the current client if you are on your client's dashboard



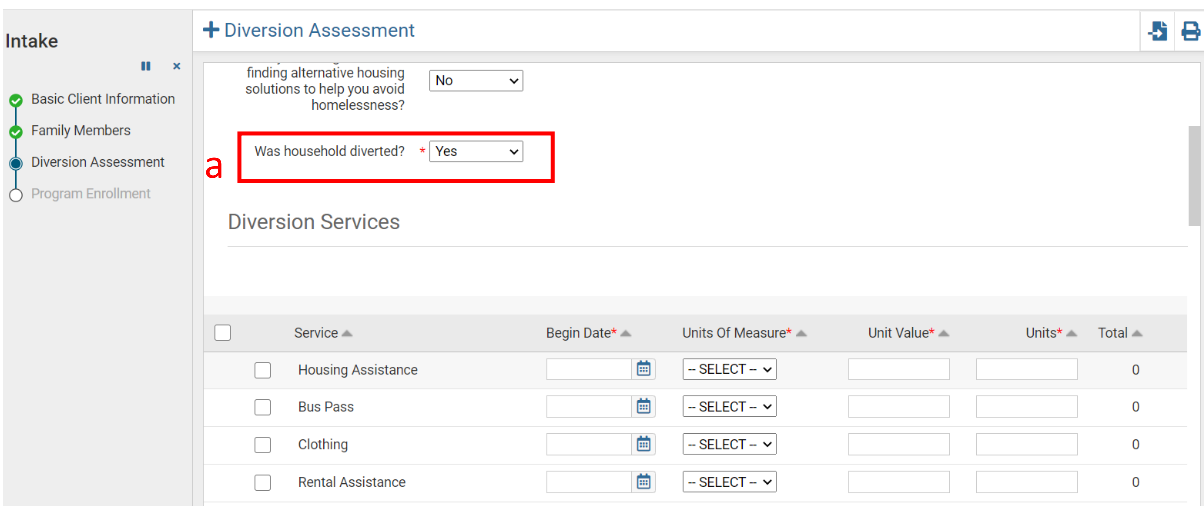
NOTE: The Basic Client Information page and Family Members page of the workflow are completed the same way as any other Intake. If you have questions about how to complete these pages, see the cheat sheet for Entry Assessments.

5. Complete the Diversion Assessment. If you have questions about how to complete Diversion, see the additional Diversion resources in the Diversion training provided by MDHA.

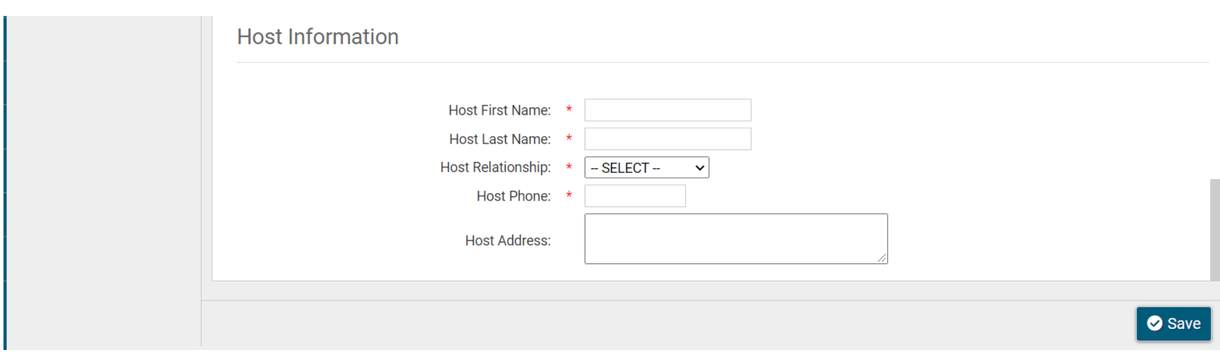
NOTE: Different answers to these questions will cause additional questions to appear. Every question with a red asterisk * is required.



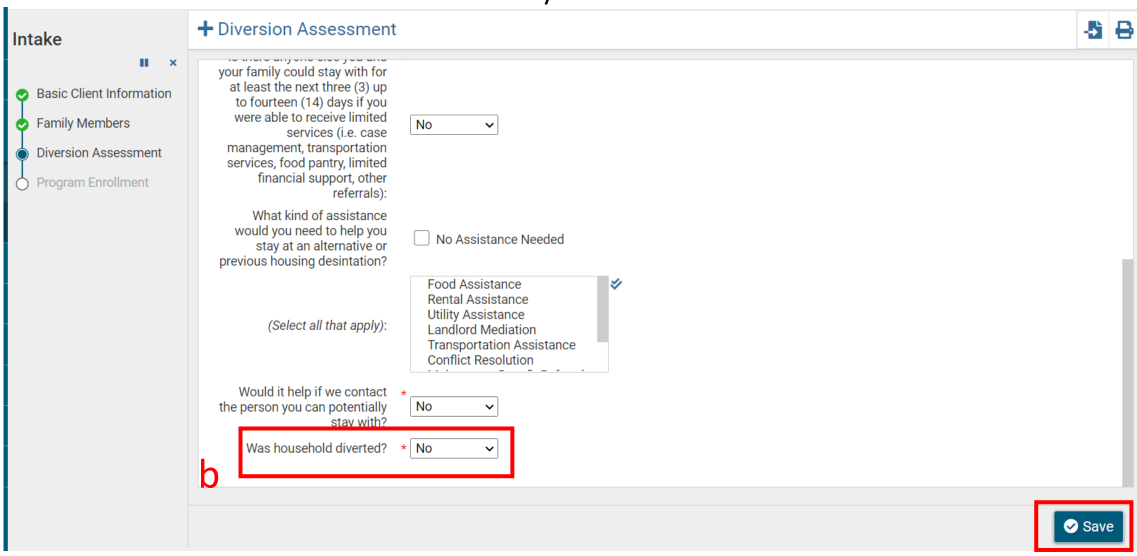
a. If client is diverted, a Diversion service is recorded and no CE enrollment is recorded.



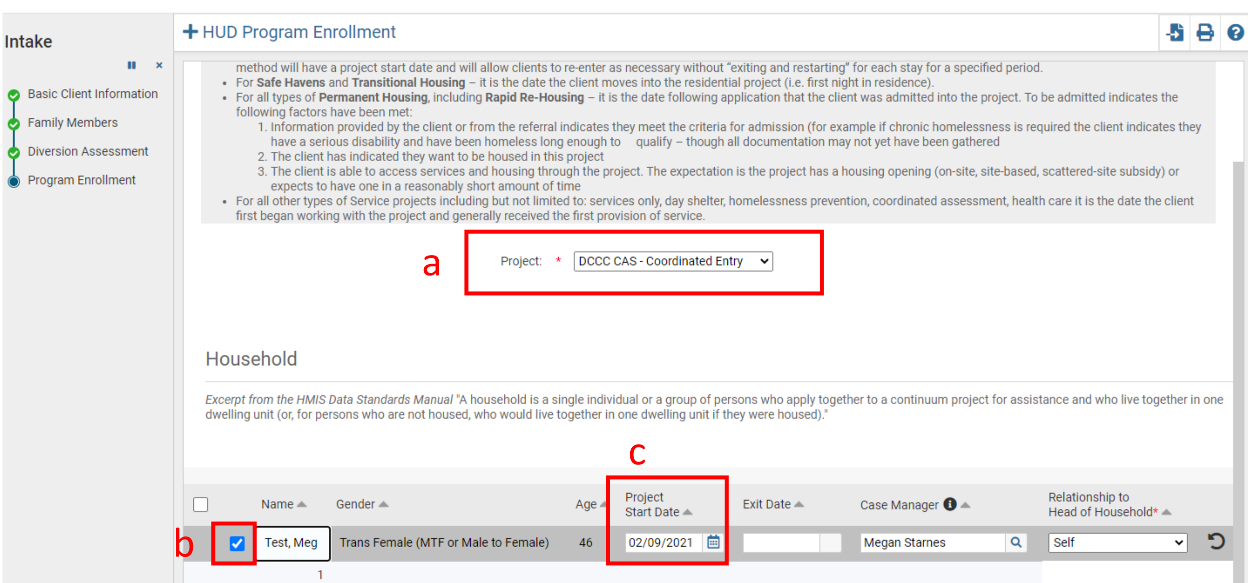
Host information should be recorded so that the system has a record of where that client is being diverted to. Note that the host can be "self" if the client is returning to their own home, or is not being hosted by any other party.



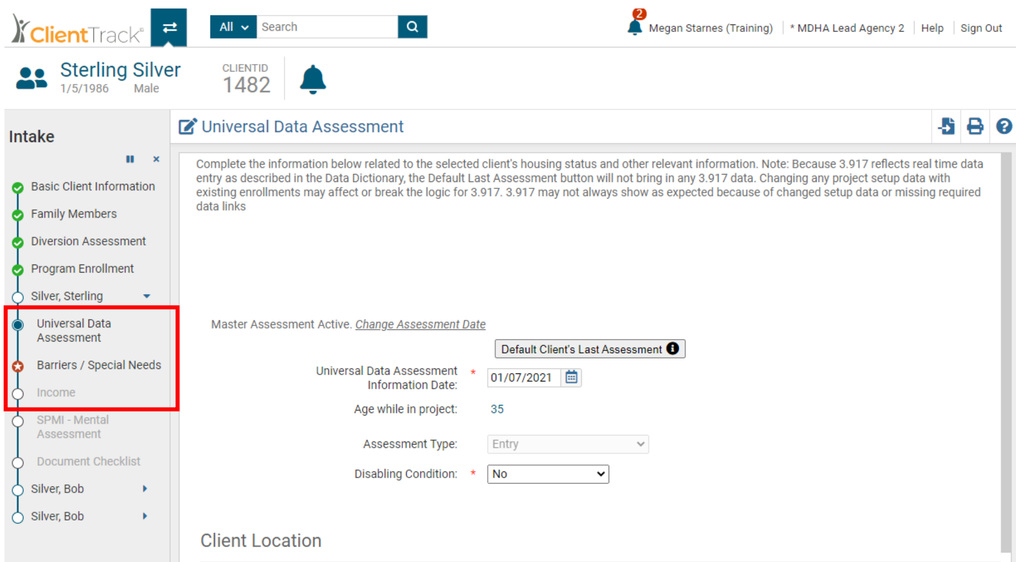
b. If client is *not* diverted, click Save to continue with CAS intake workflow after answering all other required questions on the Diversion Assessment page. It is crucial that this information is accurate and true for your client.



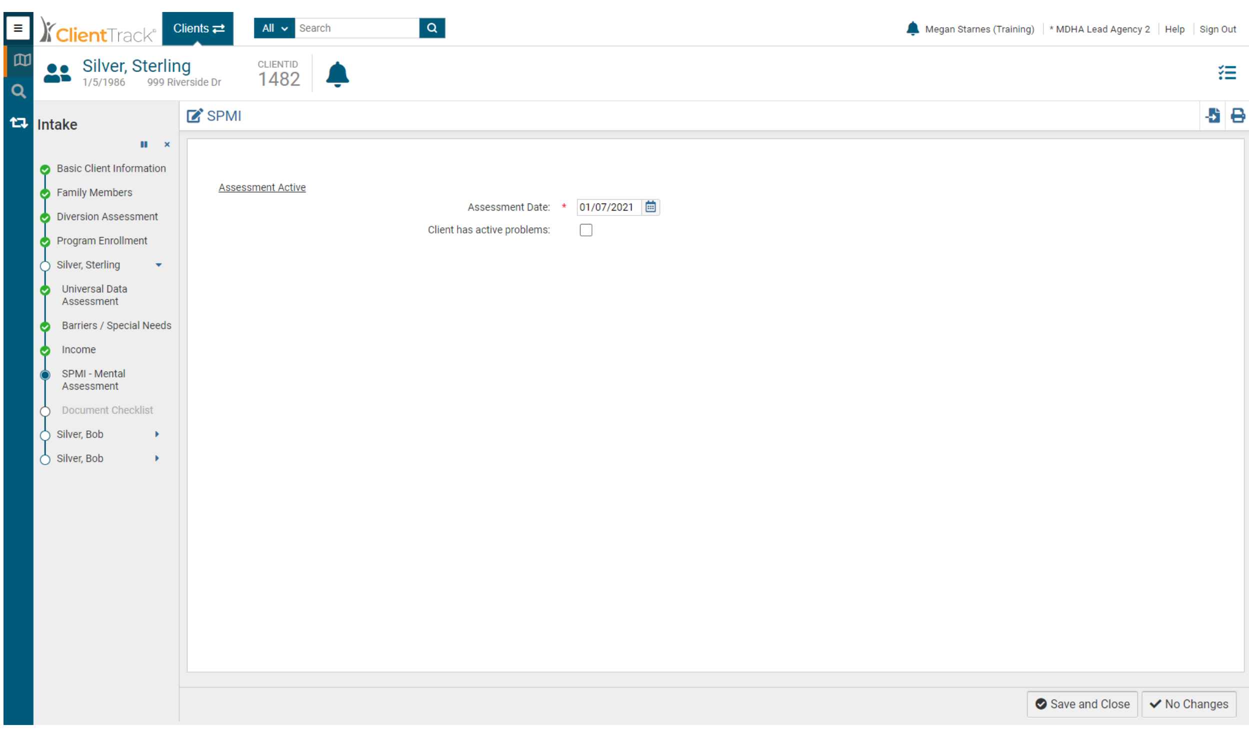
6. Complete the HUD Program Enrollment page of the workflow.
   a. DCCC CAS – Coordinated Entry is the only project that should be available. If you see any other projects here, click the X in the progress bar to cancel this workflow and check that you have selected Dallas and return to step 1 of this guide to confirm your ClientTrack settings.
   b. Check the box next to every family member who will be enrolled in CAS.
   c. Be sure to enter the appropriate Project Start Date here if you are not doing real time data entry.



7. Complete the Universal Data Assessment, Barriers, and Income pages. If you have questions about how to complete this assessment, see the cheat sheet for Entry Assessments.

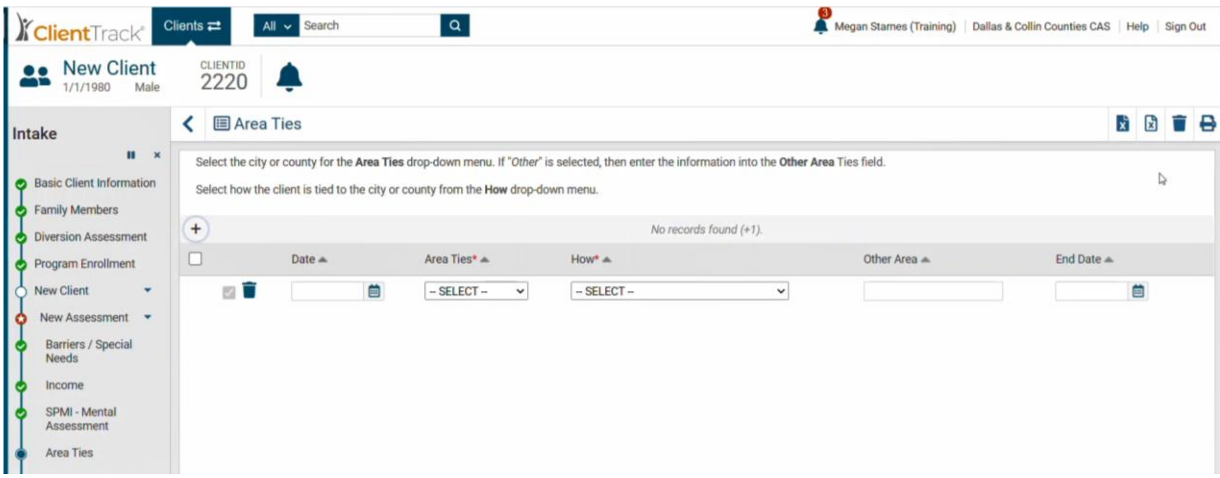


8. All users are advised to skip SPMI – Mental Assessment page at this time.
   To properly skip this page:
   - Backdate the Assessment Date, only if you are backdating this enrollment
   - Leave the check box empty
   - Click Save and Close

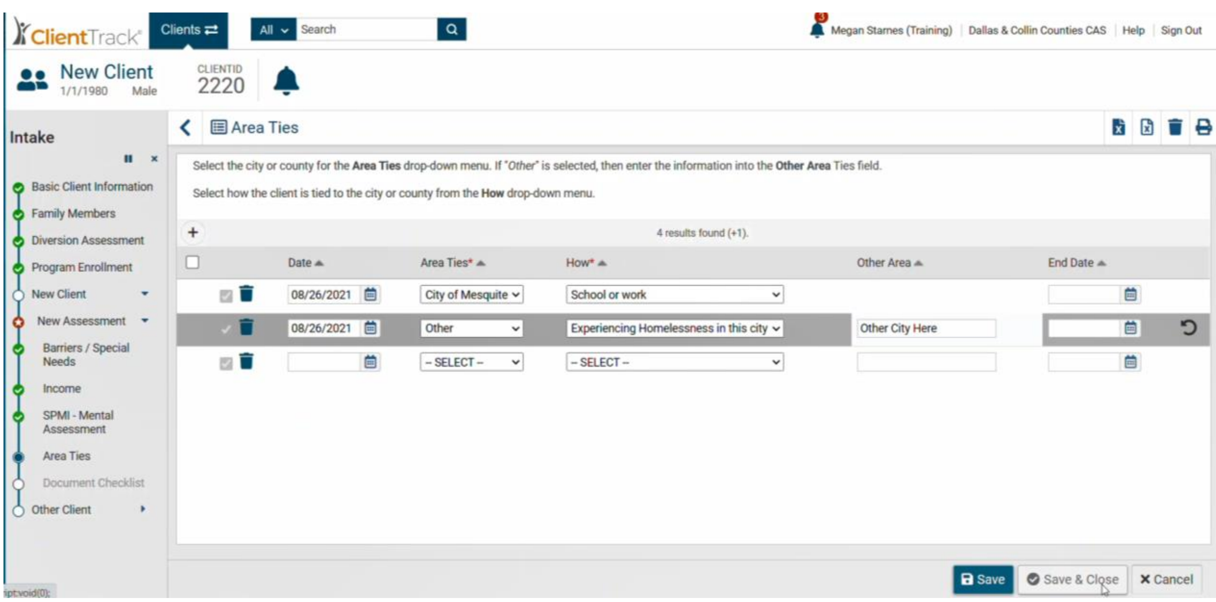


9. Area Ties are required for referral to certain EHV programs. Add any ties your client may have to a given area and click Save and Close.

   - Date – should match assessment date (CAS Project Start Date)
   - Area Ties – city or county where client has ties
   - How – client' relation to the given area



Once you click Save & Close, the system will display the area ties you entered. Click Save and Close again to continue your workflow.

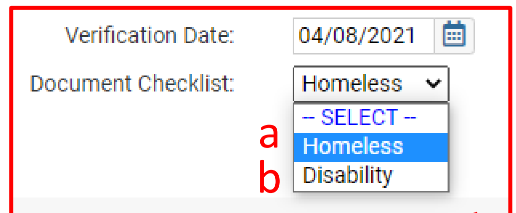


10. Complete the document checklist if you already have documents available for your client. This page is optional and can be completed later. See the cheat sheet for Uploading Documents to CAS Document Check to complete an upload outside of this workflow.

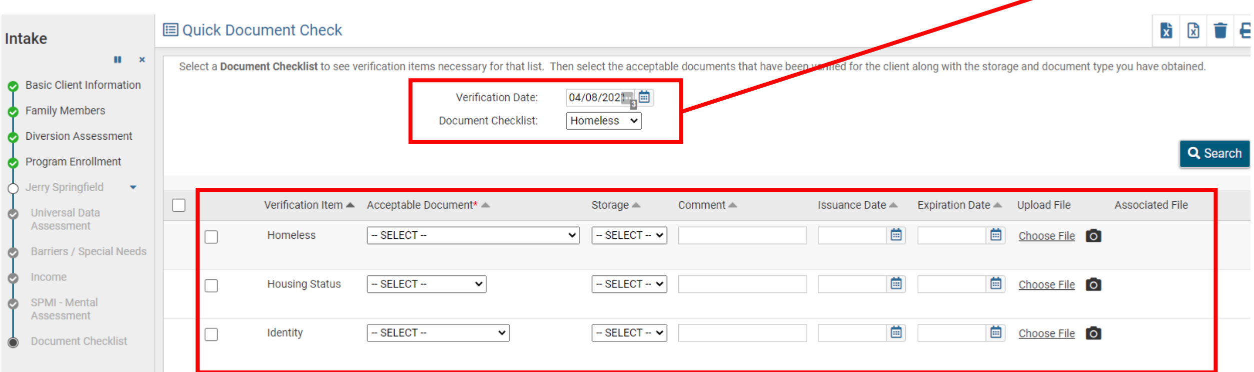
    NOTE: While it is not required to continue the CAS intake workflow, documentation is required for your client to stay active on the HPL (or CAS Queue).

    Document Checklist Options

    a. Homeless – provides the following document options:
        i. Homeless verification
        ii. Housing Status verification
        iii. Identity verification
    b. Disability – provides the following document options:
        i. Disability verification



    See the table below to complete the remain fields on the Document Check page.



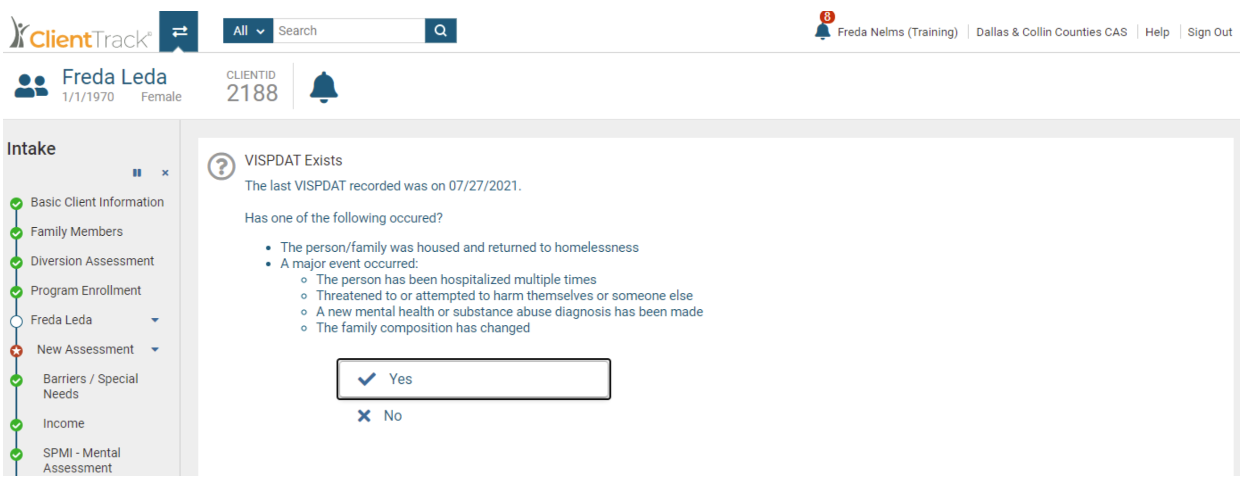
Field	Function
Acceptable Document*	Document type. Will vary based on verification item type chosen above.
Storage	Not required at this time and can be blank.
Comment	Please record your agency name and time period for which this document is relevant, if applicable, especially for documentation of homelessness.
Issuance Date / Expiration Date	Dates document was issued and expires. Optional, not required at this time and can be blank.
Upload File	Use Choose File to upload a file from your device. Use [camera icon] to take a photo of the document with your device's camera.

11. The next page of the workflow is the VI-SPDAT. However, before the VI-SPDAT loads, you may see one of the following pages depending on the client's situation.

Existing VI-SPDAT

If a CAS enrollment is created for a client with an existing VI-SPDAT, the workflow will prompt the user to confirm if the client has had a change in their situation.

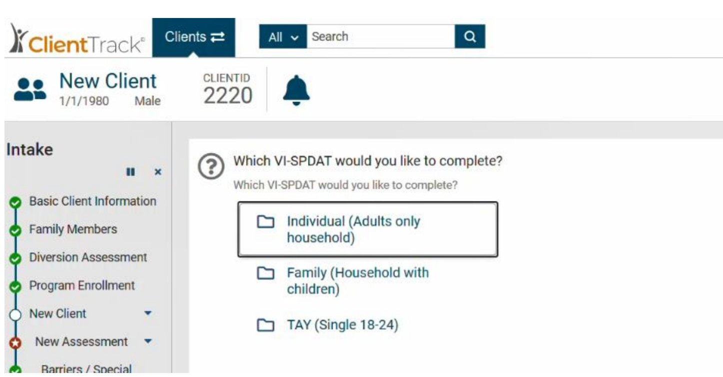
- Selecting "Yes" will move forward with a new VI-SPDAT and the latest score will pull to the CAS Queue.
- Selecting "No" will complete the workflow and existing score will pull to the CAS Queue.



VI-SPDAT Prompt for Households with Multiple Family Members

If a household has more than 1 family member, the system will ask you which type of VI-SDPAT you want to complete. Please use the following guidance.

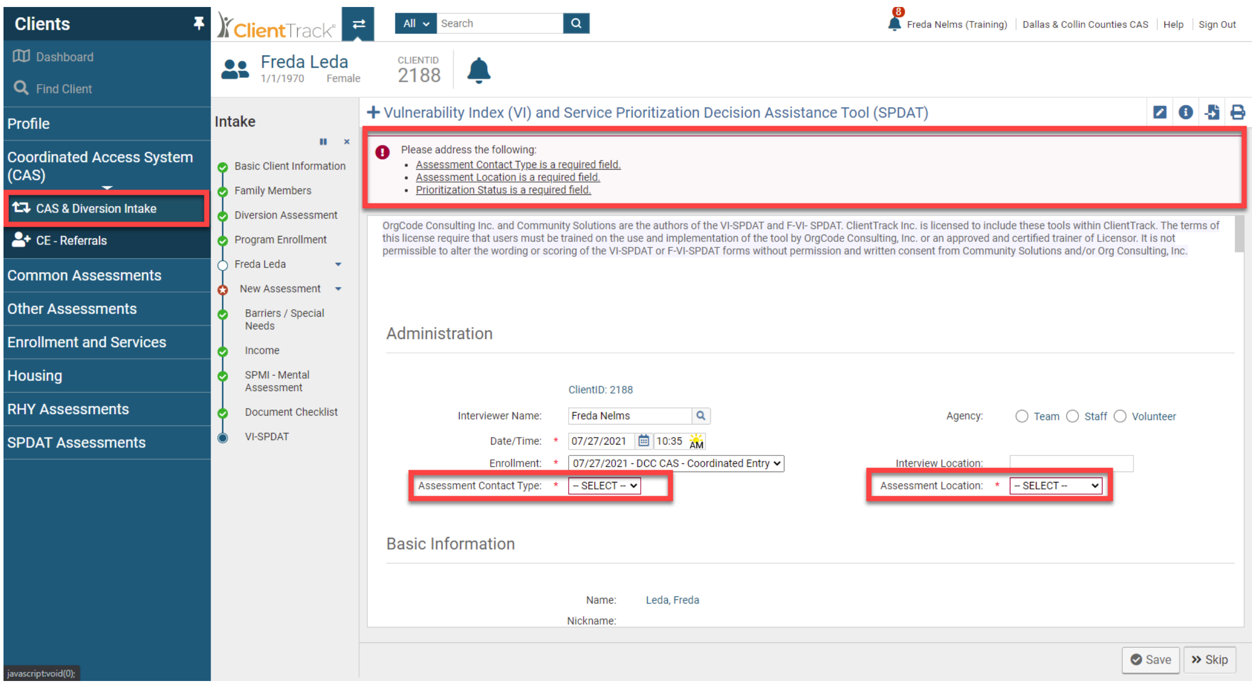
- Individual – households with only adults (i.e. HoH and adult spouse)
- Family – households with adults and children under 18
- TAY – head of household ages 18-24



Completing the VI-SPDAT

Complete the VI-SPDAT with your client if you are ready and able to at this time. If you will be recording the VI-SDPAT now, it must be completed in full with no empty boxes or blank fields. If you need guidance on completing a VI-SPDAT, please complete VI-SDPAT training in LearnHC. The following fields are required:

a. Assessment Contact Type
b. Assessment Location
c. Prioritization Status (see more in the next section)



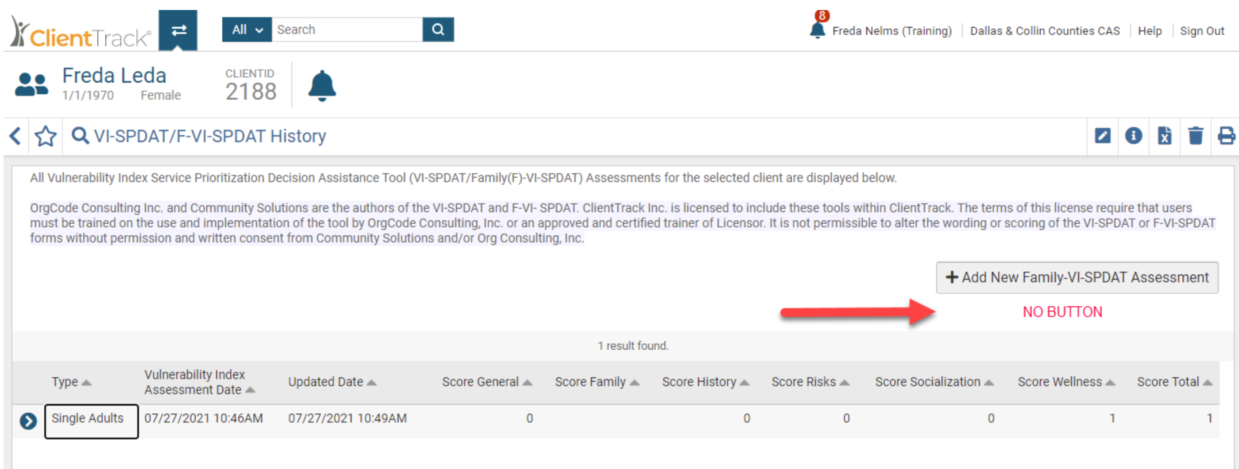
If the assessment questions related to scoring are left blank, a message will appear informing a score of 0 will be recorded.

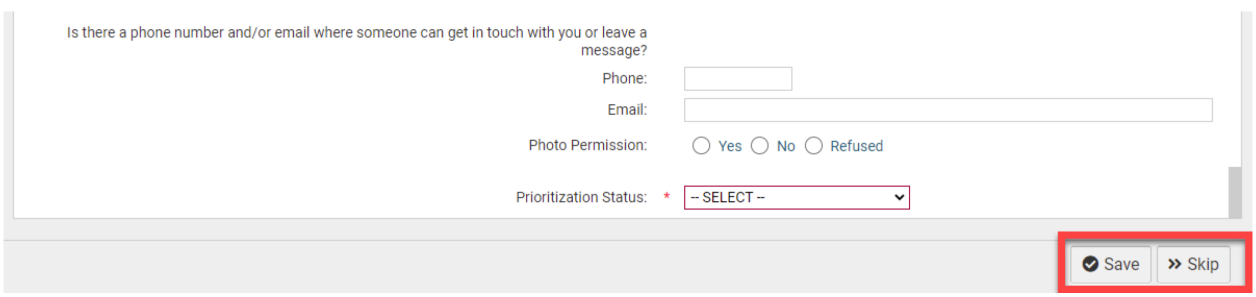
Skipping the VI-SPDAT

While we recognize that your client may not be ready to complete the VI-SPDAT at entry, a blank VI-SDPAT cannot be saved within the workflow. If the VI-SPDAT is not ready to be recorded at the time of entry into the CAS program, click Skip to record at a later time. Do not record any other answers to any questions in the VI-SPDAT at this time.

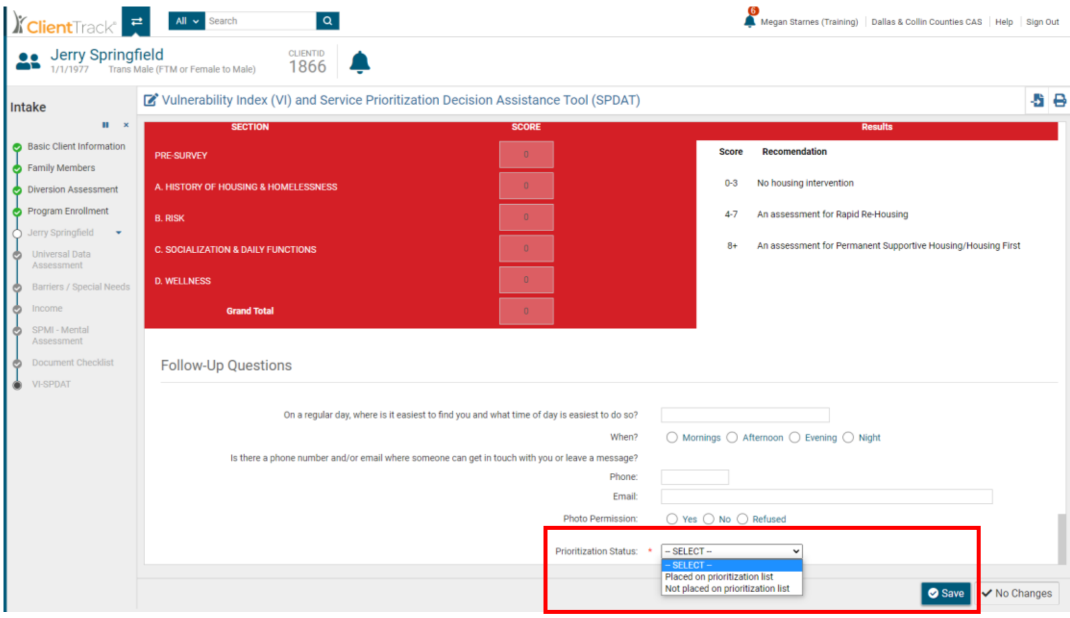
NOTE: While it is not required to continue the CAS intake workflow, a VI-SPDAT is required for your client to be matched to housing intervention by CAS Admins. The SPDAT is a different, more thorough assessment tool and is not currently being used for prioritization.

The VI-SPDAT can be recorded at a later date outside of the workflow. However, once the client has a VI-SPDAT, the option to add an additional assessment in this manner will be removed.





12. For Prioritization Status, select "**Placed on prioritization list**". This will ensure that your client's information is placed on the CAS Queue for review, match and prioritization. Click Save.



13. As with any workflow, always work until you receive this message and **click** the Finish button.

NOTE: Street Outreach, Emergency Shelter, and Day Shelter programs will continue to enroll the client in their program beginning with Step 3 below.

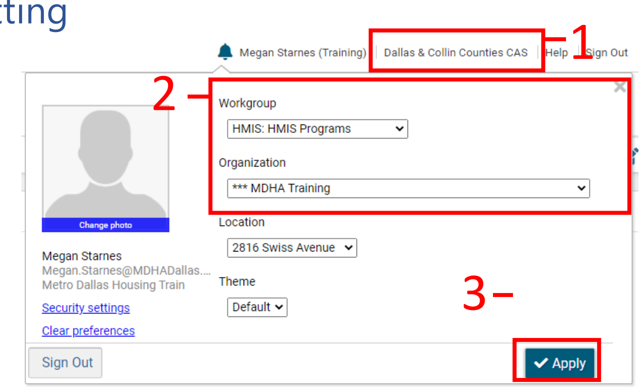
On the rare occurrence that a housing provider serves as an access point to CAS for a client, that housing provider should *stop here* and *not* continue with the enrollment in their program at this time.

3. Change your ClientTrack organization setting

Workgroup: HMIS: HMIS Programs

Organization: [your agency]

Steps:



1. Click Dallas & Collin Counties CAS in the top right corner of the page.
2. Use the drop-down menu to change your organization to the agency you work for.
   Confirm your workgroup is HMIS: HMIS Programs.
3. Click Apply.

4. Enroll the client in your program

Where: Clients Workspace

Steps:

1. On menu, choose Find Client to search for your client if needed
2. Choose Intake (intake button on menu)
3. Complete the enrollment for your agency as usual

If you need additional guidance on how to complete the enrollment for your program, see the Entry Assessment cheat sheet.