HMIS Job Aid

CAS Shelters - Processing Referrals

This job aid is intended for agencies participating in Coordinated Access System (CAS) shelter referrals ONLY. It is the responsibility of the shelter provider to:

1) Enter bed availability
2) Enter intake appointment outcome
3) Processing the program referral, i.e. enroll into the shelter program or deny the referral

Overview

The Coordinated Access System (CAS) was developed in response to community concerns and system- wide evaluations that found the system was challenging to navigate for both providers and households experiencing homelessness. The CAS is focused on establishing centralized access to shelter, waitlist navigational support and problem-solving diversion efforts. Agencies participating in CAS include service providers, shelters and outreach team who serve people at-risk of or experiencing homelessness, or who are fleeing or attempting to flee domestic violence, sexual assault, or human trafficking.

Centralized Access - Households can call the Housing Crisis Line (2-1-1) to be assessed and triaged to appropriate resources. Shelter referrals and waitlist management for CAS-participating shelters are maintained by 211.

Navigational Support - The Coordinated Access Navigational (CAN) team will support households on the shelter waitlist with placement and case management. A primary focus will be utilizing housing problem-solving services to help divert or rapidly exit households from homelessness.

Housing Problem-Solving - A community-wide approach to divert or rapidly exit households from homelessness, anchored by designated access points trained to provide problem-solving services.

Eligibility Criteria

Anyone at-risk of or experiencing homelessness, or who is fleeing or attempting to flee domestic violence, sexual assault, or human trafficking.
Note: Shelters and problem-solving access points may include more specific criteria.

Requesting Shelter Access

Providers can request shelter for clients by conducting the shelter assessment in HMIS. Households can also call 2-1-1 directly to be assessed and triaged for shelter, housing, and homeless services. Anyone with a completed shelter assessment is placed on the shelter waitlist. 211 will refer households to shelter based on eligibility, prioritization, and appropriate fit factors.

Housing Crisis Line

During the 2-1-1 triage process, information is gathered to determine the homelessness risk level. If a

household cannot be diverted through the initial problem-solving conversation/services offered, they are triaged and connected to appropriate resources based on risk level.

Entering Bed Availability

Shelters must enter their bed availability, also known as bed "Openings" into HMIS. The bed availability/openings will automatically notify 211. The purpose is to inform 211 the date of when each bed will become available and provide relevant details about the bed opening (i.e. top bunk, gender-specific, etc.).

1. After logging into HMIS, make sure you are in the agency where the shelter program is under
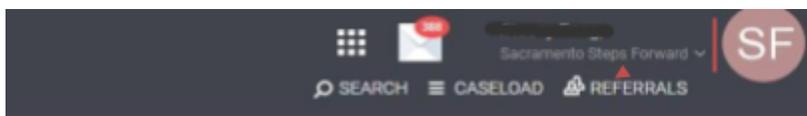
2. Click on SEARCH so that the REFERRALS option appears

3. Click 'Availability' and select the 'CES Shelter Queue CA-503'

4. Locate the shelter program name and select 'LIMITED AVAILABILITY'. The limited availability indicates the number of openings for the program and will allow you to reserve openings.
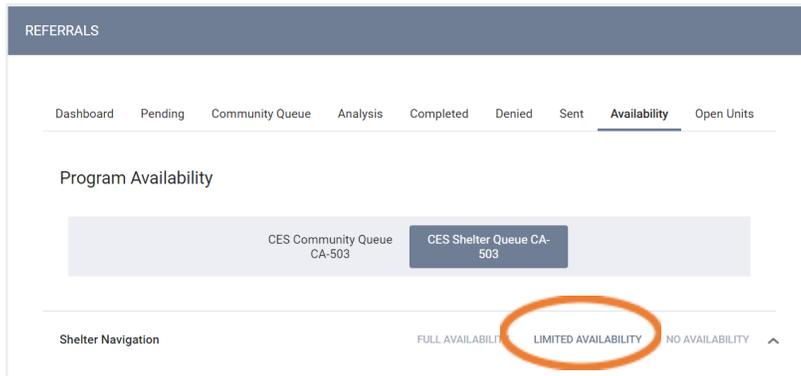
5. Click 'ADD SINGLE OPENING' or 'ADD MULTIPLE OPENINGS'. If you click 'ADD MULTIPLE OPENINGS', the system will also display a number of openings field. Only select the multiple openings to indicate identical bed information.
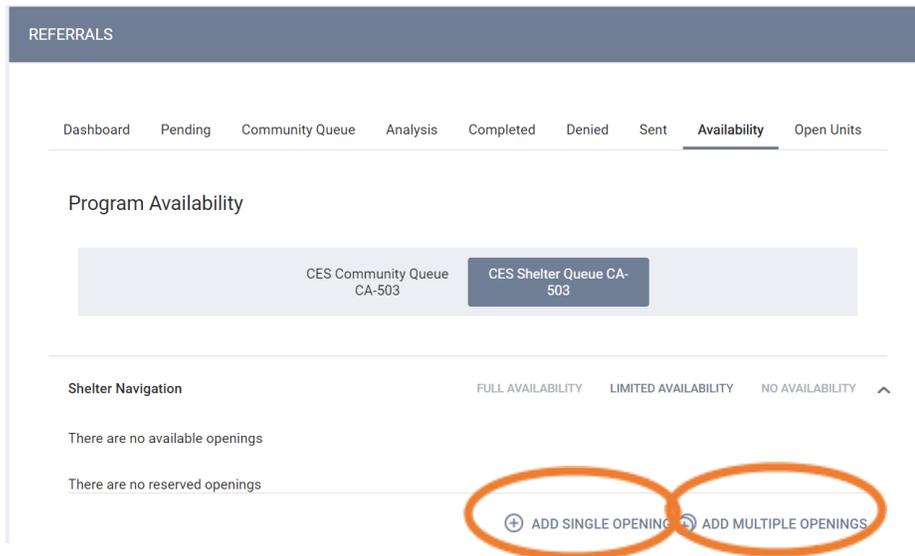
6. Enter the details of the opening such as: the date, program type, and other relevant information, and click 'SAVE CHANGES'

> Additional Notes section: add any information important for 211 (i.e. top bunk, service animal accepted, gender-specific)
>
> If there is a pet/kennel attached, please include it in the Unique characteristics section
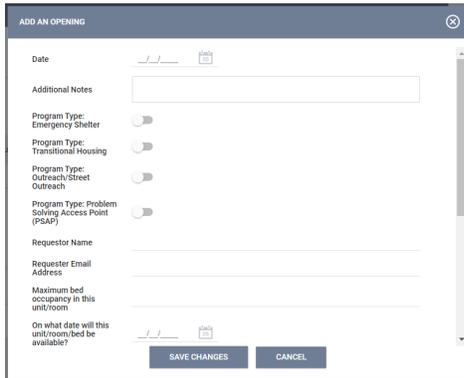
Entering the Intake Appointment Outcome

211 will refer households to shelters based on eligibility, prioritization, and appropriate fit factors. The method 211 will refer households to shelters by scheduling a shelter intake appointment. The shelter provider will need to enter the outcome of the intake appointment to indicate whether the client showed up as "present" or "no show".
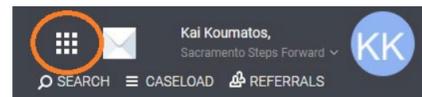
1. Navigate to the launchpad at the top right corner
2. Click on the 'ATTENDANCE' icon. This is also known as the attendance module.
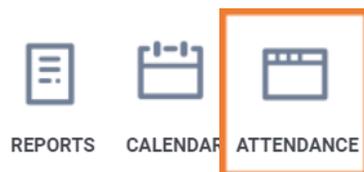
3. Locate the service name that starts with "*Shelter intake Appointment: Emergency Shelter (ES)…" and click 'RESERVATIONS'

4. Select the date for which you want to manage reservations. The available slots will display for each day. Select the date and locate the name of the client to update the intake appointment outcome. When a reservation has been made, the slot will be in blue.
   - In the RESERVED box, select either PRESENT or NO SHOW.
   - After making the selection, the screen will automatically update. To modify a slot, select the slot and make the necessary changes in the right sidebar.

You can view and modify a particular reservation slot in Calendar View.

To do this, click the slot, then click CALENDAR VIEW from the RESERVED box.

The screen will switch from a date-oriented view to a slot-oriented view that displays all the reservations for the selected slots in both the calendar and in the list below the calendar. *Notice that the drop-down in the center of the screen above has changed from dates to slots, allowing you to switch between slots without having to exit the screen.*

Processing the Program Referral

It is critical for the shelter providers to process the program referral either by:
1. **Accepting the program referral by enrolling the client into the shelter program; OR**
2. **Denying the program referral by updating the referral to indicate the reason for denial.**

Important note: Enrolling the referral to the shelter program will update the referral status to 'Complete' and close the bed opening. Denying the referral to the shelter program will update the referral status to 'Denied' and re-open the bed opening.

For more detailed instructions on how to process the program referral, please see the job aid, How to Process Referrals From a Community Queue.