CE Affinity Group Meeting

11.19.19

0:00:03 Mary Schwartz: Welcome. Tuesday, and we're excited to have you here for the Coordinated Entry Affinity Group. We've been talking about hosting these meetings for a while. This invitation went out to HMIS leads and any CoC leads that wanted to join and it's been talked about on several other forums as an opportunity for you all to gather with us and go through the data collection and project setup around our coordinated entry data elements. So first I want to introduce all the folks you see on the screen right now. I'm Mary Schwartz with Abt Associates, we have Jules Brown here from Abt Associates as well, Meradith Alspaugh from The Partnership Center. We have Brian Rocopriore from Cloudburst, and with us from HUD is Abby Miller, from Ledger, and I believe we have William Snow on the phone as well. So thank you to all of the great panelists that are here, and I am gonna hand it off to Abby to get us started.

0:01:07 Abby Miller: Alright, thanks, Mary. So, I wanted to start out just by laying some groundwork 'cause I think it's obviously a topic where there are a lot of technical details to get caught up in. But I wanna take a step back and just reiterate why we're collecting coordinated entry data in the first place. At the community level, this is really important for you all to know a fairly accurate timely list of who's in need of crisis or housing assistance at a given point in time. That you know who's been prioritized for that permit housing assistance, who's next on the list, to understand how many people are coming into your system over a period of time, who they are so that you can make system planning decisions, better resource decisions and then that you can understand how well your system's functioning and identify the bottlenecks in it. So where are people getting held up? Where are permanent exits not happening at the same rate? Are there access points where people aren't getting referred to assessments at the same rate? And to actually find all of those things just like in our regular projects, we can't rely on anecdotal information. We have to look at data. So that's the why, and this whole thing that we're going through today is really designed to help you think about how to best setup these coordinated entry elements in your system depending on what you have going in your system. So if you flip forward to the next slide, Mary.

0:02:51 AM: I just want to touch briefly on what HUD is going to be requiring for reporting and again, this is required reporting in the form of an APR for SSOCE grants. So if we just first step back from the requirements that we've all been talking about and a lot of requirements that people have been thinking that they had to have, I'm gonna ask you to suspend that. I think part of what we wanna do here today is blow up some of the language we've been using. In particular, the term Project. Project is a really challenging concept when you talk about coordinated entry because coordinated entry is not a project. It is an orientation, it is a way of doing business, it is a process. It is a system in some ways, but we still have to set boundaries. There has to be a way that the things that we do for coordinated entry get picked up in a logical way so that we can actually see them in report form to do the things that I was just talking about, like all of the reasons why we're collecting coordinated entry data. And so it's the act of forming a boundary around the information to pick it up into a report.

0:04:17 AM: When we say project, that's one way of getting at that, but really the whole thing that we're trying to do today is just answer who's in and who's out of a report when you pick it up. And so we're just trying to set those boundaries and so, suspending questions or concerns about "We need to have a single project.", we're gonna get to that, but I wanna start by saying, we're just trying to figure out reporting here and reporting that will be useful for you, for us, for everybody. So what you see on this slide, you have to be able to report on the key aspects of performance. So what we have here is Assessment Types, Prioritization Status, Access Events, End Results, Referral Events End Results. Number of persons served and number of households served. You have to be able to

report as if the coordinated entry is a coherent project within your HMIS but it doesn't have to be set up that way. So we're gonna look at a number of models today that show how you might do that, but what you do need to be able to do is answer those questions.

0:05:35 AM: At any given point in time, can you identify the people who report that they need assistance, haven't resolved their crisis and haven't disappeared from a CoC? And over a period of time, can you identify the number of people who have qualified for the system, who've been assessed, been prioritized, been offered housing and been successfully housed? The one thing that we can say definitively about the APRs, that we're gonna be racking up numbers by household. So we have to have head of household and members, members of households recorded in HMIS and the things that are required, and again we are gonna go into the different ways that these required elements are picked up, but the UDEs the two coordinated entry elements in current living situation. We are, honestly, we are still working through the programming specs because this is a different kind of report than we have used for an APR, before. If you have specific operational questions as we go today, definitely ask them 'cause that is gonna help us think through all of the wrinkles, but you may not get an answer today, so expect that. But if you don't get an answer, I would say submit an AAQ after this so that there's a record of the question and that we are held accountable for getting a response back to you. We will try to answer everything, we can today, but operationally with the reports, probably won't be able to. With that, I'm gonna give it to Jules to talk more about CE Data collections.

0:07:22 Jules Brown: Thanks Abby. Yeah, so I am gonna try and get a little bit more concrete and into more details about what Abby set up. But I do think that kind of orientation around letting go of the requirements that you're maybe thinking or in place would be a great place to start this conversation. I also wanna say that I will welcome questions as we talk through each of these ideas or approaches to projects set up in order to ask questions. You can use the Q and A panel. And Mary, I don't know if there is any technical specifics about how to do that, but I think you just type your question in yup, just type of question in and we'll have folks looking at those questions in writing and they will be interrupting me If we need to pause and address the question as we go through. I also wanna mention the specific affinity part of this affinity group that is inherent in the title today is no wrong door CE affinity group. And then tomorrow is the single, multi-front door CE affinity group I think meaning like a centralized process there.

0:08:50 JB: So maybe you have multiple front doors, but it's a centralized front door. So we're actually gonna do the same presentation for both days, so don't feel like you need to attend both days unless you want to kind of revisit or hear, the different kinds of questions folks are asking. The idea is more that we just wanted people to be in the same space asking questions that might be more relevant to each other. As we talk through these ideas. Okay, so I'm gonna dive in and I'm gonna really talk about two things, two dimensions of the concept of data collection for coordinated entry. And we're going to talk about this in terms of HMIS... So I am just gonna put that out there. I think the boundaries of what's in or out of HMIS is something that will come up as we talk about the set up, but generally speaking we're sort of assuming that we're talking about trying to get as many folks who participate in coordinated entry into the HMIS as possible.

0:10:00 JB: Okay, so the two dimensions, I'm gonna talk about are the concept of project set up and again Abby clearly articulated when we say project, we are trying to think a little bigger than just that really strict definition that we have in HMIS... We're really talking about kind of a boundary. So that boundary might be drawn by creating a single coordinated entry project in your HMIS it might

be on the complete opposite end of the spectrum a situation where there is actually no coordinated entry project, per se, in your HMIS but you're able to draw the boundary around the folks that participate in coordinated entry using reporting specifications and then you might follow any where on the spectrum between those two extremes and that will really depend on how your system functions, how what's your data collection, which are privacy and security requirements are all kinds of factors that you might wanna take into account when you think about where on that spectrum you're gonna fall. And then the other dimension, I'm gonna talk about is around that client level data collection.

0:11:20 JB: So once you set up those projects in which projects do you collect the data elements and then how do you document movement through perhaps multiple projects, even though you're kind of addressing the same client and the same sort of referrals, or outcomes from a particular referral for a particular client? Again, here, there's kind of a continuum approach of approaches you can take, or a spectrum of approaches you can take, you might not have already you might not already be collecting data about folks in your coordinated entry system or perhaps you're collecting that in something outside of HMIS and you want to take this opportunity of the new data elements being put in place to really create a process that fits on the lines of the data standard requirements, we're starting from scratch it is a good opportunity to build what you want your system to look like, what will meet HUD requirements, and what will be really functional for you on the other side of that spectrum, there are folks who have been collecting these data points for a really long time. You might have different names for different parts of the data fields that HUD has given particular names to you, might have different sort of conceptualizations of what those pieces mean and we'll talk about some examples of those, but you could if you can start from the place where you are and what's working for you and kind of.

0:13:04 JB: Work your way back to how the data standards fit into what you're already doing, but that's totally fine as well. And again, there's gonna be a spectrum that you're gonna fall along, maybe some places are working for you, some data collection points are really working well for you, but you're seeing that there's room for improvement in other areas and these new data elements give you a chance to kind of refresh your process. The idea is that kind of no matter where you fall along either of these two spectrums, we, me personally, but then also HUD, me personally as a piotr writer, but also HUD has been really clear that they want these data elements and these data requirements to be flexible enough to make this process really work for you. So HUD gets what they need which is actually a pretty small scope of what you guys need to operate a system effectively on the ground, but that it's really working for you, and the process that you have already established and is really, in some cases is really functional in your system already.

0:14:20 JB: So let's start with that first kind of spectrum that we were looking at in terms of projects set up. And I'm gonna walk through how it might look to have one extreme or the other, and then some examples that fall in the middle of the spectrum. So all of these decisions about kind of where you and your CoC are gonna fall on that spectrum are gonna be based on how your system is set up, do you have a single front door and everyone's channeled exactly through one particular place that does all of the assessments and sort of handles all the follow-up or is it really diffused, is it really just no wrong door and everyone's kind of part of this system and it's more of a mind set than a strict bounded process? You're also gonna wanna take into consideration your privacy and your security requirements that are already in place, the needs that you may have to evolve those privacy and security requirements. You're also gonna really have to think hard about the reality of who's participating in HMIS in your continuum.

0:15:34 JB: So if you had every single street outreach project and every single emergency shelter provider and your 211 system, if they're doing a triage, if all of those places are already participating in HMIS, you're gonna have a really different kind of reality to set up a project and than someone where, than a CoC where that's really not the case and most street outreach projects aren't participating in HMIS and there's a lot of mission-based shelters that aren't in HMIS, those are just gonna really color a lot of what you're gonna be able to do. So let's start the first example, only one project in, one CE project in HMIS, you could set up a just a single project that's in your HMIS and all the coordinated entry specific data elements are collected in that project and any participating agency that does triage or assessments, they could access the client records, they could add to them as the client progresses through the coordinated entry process.

0:16:46 JB: And this project would run alongside the clients' other enrollments, if they move through the systems, they might have alongside that, a street outreach enrollment, a shelter enrollment, etcetera, but their coordinated entry enrollment would be open for the duration of the time that they're, until they're housed basically. And so then you can set a boundary around that. We talked about boundaries and sort of that's how we're gonna look at reporting. You can set a boundary around just that coordinated entry project, and then that would give you a really clean report on what's happening in your coordinated entry system. So this would be like really clean and easy, it would also work pretty well if you have a really centralized coordinated entry model where there's that one entity that's doing all the triage, the assessment and the housing match stuff, and that that's all really in reality kind of running alongside other enrollments. On the opposite end of the spectrum though, you might not have that kind of set up at all.

0:17:58 JB: You could have a no wrong door model, if you have, let's imagine you have full HMIS participation, all your street outreach projects are there in your HMIS, all your shelters are there. If it worked better for a particular continuum, like this, you could just add the new coordinated entry data elements as or collection requirements for each of these project type. Now, if you approach it this way, you need to be able to draw a boundary, a reporting boundary around the clients that are in the coordinated entry system, and then those that have exited from the coordinated entry system. So we can talk a little bit more about what that might look like in terms of reporting requirements, but essentially you would need to be able to look across multiple projects types, you would be able, you need to be able to determine that a client's sort of first contact point becomes translated as their entry into the coordinated entry system.

0:19:02 JB: You'd need to be able to see multiple assessment records and event records across these multiple project type and you'd need to be able to look at when a client has for example a move-in date in a permanent housing project, or they haven't been seen in any project type for a certain period of time that you would then kind of exit them and move them off the list or off your, either your active list, or your prioritized list. This is gonna be technically a lot more challenging than this sort of, this side of things, the left end of the spectrum there, where the report is really like an APR, just a report that's run on a single project.

0:19:53 JB: But if you are able to do this kind of reporting And eventually HUD is able to come up with more specifics, around how to approach that. This definitely would meet the requirements in the data standards because you are able to report on your clients in a coordinated entry in coordinated entry as if they are in a single project in HMIS and ultimately that's what the data standards require that you are able to report on all of the things in the data standards as if your

projects are set up. In the way that they are defined in the data standards. So I'm gonna pause there just for a sec and I'm gonna talk about a few I'm gonna talk about two potential examples of structure structures that fall in between these two extremes. I think there are probably potentially infinite ways you could combine these things in between these two extremes on the spectrum. But I just wanna pause there, real quick and see from the question triages, if there's anything that has come up that we want to make sure that we're addressing before we dive into that.

0:21:12 MS: I'm not seeing anything specifically to address verbally.

0:21:16 JB: Okay. It looks like there have been some questions come in some really good questions that are coming in.

[overlapping conversation]

0:21:24 MS: And so we do post things publicly, so when we answer it, we send them the answer out publicly so that everybody has the benefit of seeing what questions were asked and answered.

0:21:37 JB: Yeah, so hopefully you can just see those up there on your Q and A screen. The questions that are coming in are great questions, they're all just questions that we're going to get to shortly. So the triages are not blowing you off. They just know what's coming. Okay, so let's look at one of those examples that falls in the middle of the spectrum. This is a kind of, you can imagine a situation like Larry Sullivan raise he's in a rural area and has three regions or Denise mentions... She's also got four regions, going on. And this would be a way that you can set that up and Denise. You mentioned one approach, which is that you, it sounds to me like you have one coordinated entry project for more like the last-most approach, but that when you enroll, the client, there's kind of a next step that allows the project to differentiate between those four regions.

0:22:49 JB: That's a great way to approach that. You could also approach that as setting up three In Larry's case he's got the three regions, so he might wanna build out three separate coordinated entry projects and basically it's the same thing. It's the last most approach, it just a matter of having multiple projects set up because you have multiple geographies that are so distinct from each other that really merging them into one project, isn't really constructive, or helpful for anybody, it's unlikely those clients are really gonna be moving back and forth. You could also think about this approach if you have some COCs have a very clear distinction between their front door, prioritization or triage process, where they're really about kind of moving people as quickly as possible into either prevention or diversion or focusing on problem solving, right at that front door maybe making some emergency shelter referrals but that's really kind of its own process.

0:23:58 JB: That functions really clearly and in a defined way, and that that's separate from that back end process where what you're really focusing on there is prioritizing people for scarce permanent housing resources, so you might wanna have two separate projects to really kind of... Keep those down [0:24:20] ____ clear those might be totally different agencies that are participating in that, or one is really operated by one agency and one is operated by multiple agencies. Those are another way you might wanna think about splitting CE project out, but again, maintaining all that data collection in the coordinated entry project, that runs alongside the clients, other enrolment in the system, and then a third example that is flashing wild fourth example, sorry, there it goes, is kind of the hybrid between the two. So here, this would be great in a system where you have a lot of... It's a no wrong door system. You have a lot of different agencies doing a lot of

the triage work. A lot of the assessment work some of the referrals. Those kinds of things are happening all over the place. But you don't have, total. HMIS participation among your street outreach projects among your emergency shelters, you don't have necessarily a place where it makes sense for storage of some particular data element or another.

0:25:42 JB: So for example, maybe everybody is doing referral activity, but there's one particular agency that does assessment or vice versa, or something, you could set up this situation where you add those new data elements that are required to the projects where it makes sense to collect them, but you also have a catch all coordinated entry project, where management staff, from the coordinated entry project, can record information that you're not able to record anywhere else. So if there's a street outreach project that feeds information to the coordinated entry project in a case conferencing setting, but they don't participate in HMIS... The coordinated entry staff could enter just the necessary data points into this kind of catch-all-coordinated entry project, so that you have a place in HMIS to store those data.

0:26:38 JB: This again would be a little bit more complex in terms of reporting 'cause you need to draw that boundary, around all of those projects. So kind of like this, right Most example, you need to be able to look across all the project types and then in this case you'd also wanna throw that catch all see project in the mix. So again, these are just examples of the setups that you might wanna consider. That's all along the spectrum. There's again, kind of infinite flexibility to create your own based on what you have that's working for you and then on what you want to see sort of now that maybe now that you've started, you've learned some lessons about what you wanna see, and this might be a good time to think on your process, and see if there's any adjustments that might need to be made to accommodate either the data collection or just something that's more functional for your process? I'll pause there again before we go on to talking about the actual data elements themselves, and how those fit into these concepts. Do the triages have any questions that are coming up doesnt look like it.

0:27:56 Speaker 5: So there's one question here that they're wondering if the data that's being collected here is gonna feed into the LSA at some point and pathways and Stella.

0:28:10 JB: Eventually I would I to think that the answer to that would be yes. And Abby is nodding her head and maybe I'll let her talk.

0:28:16 AM: Yeah, Yeah, we do have our long-term plan is to get coordinated entry data into Stella so that you can use it so you can use it to see more about your performance and your inflow touches on Coordinated Entry versus interventions. It'll give us a lot more robust data to do system planning for.

0:28:48 JB: It will just as someone who works on the LSA specification, so it will take a while so collect it and get really comfortable with it, and get it really clinging and we will throw it into the LSA mix. Okay, alright, so let's talk about that client level data collection and we'll kind of walk through how these these approaches, these examples, then layer those data pieces on top of them, but just to reiterate the concepts we wanna think about here, we want to make sure, that again, you're meeting the requirements but you're really thinking about it from the perspective of what's already working for your system, and so if you already captured these data points even if they go by a different name, and we'll talk about some examples of those as we go through or not even just a different name but sort of like a different conceptualization.

0:30:04 JB: Are you already capturing those data? Is there something that you're capturing maybe outside of HMIS... But you just need to bring those pieces into HMIS and make sure that they're fitting into the right project set up so that you can collect them. And then how I think this probably is the ultimate question is, how do you work with your vendor to make sure that if you do need to rename certain fields or put some fields in some project types and some fields in another project type. How are you going to make that work with your vendor? And those are all kind of questions to just keep in the back of your mind. We'll talk about this an example how you might approach things, but you also wanna consider these kind of reality-based side of things as well, so let's start again with that kind of tidiest possible, scenario, a centralized model where you have all of that crisis referral and housing assessments and folks moving into PH.

0:31:14 JB: All happening through a centralized model and let's say it works best for your system to have that set up in a single project in HMIS... And in this imaginary scenario, we've got like a 211 call center doing some triage, they make a referral to a crisis assessment, Crisis Assessment gets conducted they get referred to a crisis bed, off that crisis bed someone comes in from the coordinated entry project, and has a few problem solving conversations doesn't look like it's gonna work out. They get a full housing assessment ultimately, they're referred to PH that does actually say PH referral, it's just a glitch in the interface there's an ousting from there, sorry about that. And then they're exited from that coordinated entry project, when they finally do move into a permanent housing unit. And so in this case, then you would have... The triage, is on the border here because essentially, you need to ask the question, Are you currently homeless? Are you having a housing crisis sort of? What is your status right now? And once you get that information that basic information, the answer to 3917 where, yes, the client is indeed homeless, that's when you would create that project entry into this single coordinated entry project in HMIS you'd collect a current living situation, which is 4.12 and you collect as many of the universal data elements as you possibly can.

0:32:36 JB: Remember, those are pretty minimal. Those are just names, social security date of birth vet status disabling condition, whether or not they have one not which one it is, just whether or not they have one, and then race and ethnicity. So, getting as many of those as you can there at the triage point I think, makes generally speaking, pretty logical sense, although obviously you're gonna have some folks who aren't gonna provide you with all that information, but by the time they get to that crisis assessment when you would collect data element 4.19.

0:33:27 JB: That's when you would collect the rest of those universal data elements and that's the point at which the point at which you have your first the client have their first assessment of either kind completed. That's kind of like when the clock starts ticking on data quality expectations. So, that's similar to the concept that we have for street outreach projects where that clock starts ticking, on data quality at the point of engagement and then all of the other things that happen essentially are just depending on what the client's experiences if they have a referral to a crisis bet or to any kind of permanent housing than those pieces are documented. If they have a problem solving conversation that's documented also in 420 that event data element. Any of the assessments whether their crisis assessment or full housing assessments are recorded in 419, you can have multiple forms of assessments so you can have the two types for Crisis Assessment or the housing assessment, but within that, you might also have different types of assessments, so you might have a family crisis assessment or a single crisis assessment or a single housing assessment or maybe you even have one for special populations assuming you meet all the fair housing requirements and all of those pieces

that go hand-in-hand with that.

0:35:03 JB: The way the data element is structured is intended to allow multiple type, both of those types of housing, of assessments, but also then multiple forms of each of those. Those also allow you to have your data collection be as minimal or as fleshed out as you want. So you could just record the date that you made the assessment, the result of the assessment, however you guys define that within your continuum for some continuums that might be a number, or some continuums it might be a, I don't know, an intervention type a smiley face, a frowny face whatever you guys want. However you define your scale as a result from that assessment, you would just document that result. And then whether or not the person in particular in a housing assessment, whether or not a person is as a result of that assessment, and that results from the assessment is placed on the priority list. You could also go on the other extreme event and collect every single question, every single granular response that the client gave you to every single question in your HMIS if that's something networks better for your continuum. As long as you get that in minimum, piece of the date, the result and the status on the priority list you can kind of collect as much, as much or little as you want about the assessment process.

0:36:44 JB: There's also a lot of different ways we've heard some continuums about that folks talk about being put on the prioritization list for housing. For some COCs everyone who completes the assessment might be on the list, but their score might make them very, very low on the list or very, very high on the list. But everyone who completes the assessment is technically on the list. For other continuums, that's not the case. For other continuums, you have to meet a certain threshold before you even get put on the list and then everybody who's on the list is first comes first serve or however you might approach that. From HUD's perspective, it's not so important sort of that you, which way you do it, how you name that concept or how you restrict who is in who's out as long as it's consistent and that everyone who meets that your COC's criteria for that priority is either in or out of the list in a way that your COC establishes that. So you might need to rename the data field or align it in a different place or align it with other data fields to make it kind of fit with how your system functions, but as long as you have that feel, that concept that says, "Yes, this client is on the list as of this day, off the list as of this day then you're fitting with the data standards.

0:38:20 JB: Similarly, events are recorded whenever they happen. Those are referrals, those are problem-solving conversations for PH referrals, those are the results of the PH referral. And here too we hear from continuums that have a lot of different kind of ways of approaching this concept of referral. Referral really provides, presents this concept of a push out. So I have met this client. And I think that they would be a good fit for that project over there, so I send them to that project over there. That name might not really be meaningful for you in your continuum where perhaps you have a totally different approach to filling housing vacancies instead of pushing the next three people to a housing vacancy, that you have on your list. It might come the other way, it might be more like a pulling the next three people off your list, from the housing projects, side of things. So the housing project has a vacancy, they go on to the list, they pull the next three people that meet their criteria...

0:39:32 JB: Even though that's not like what we might describe as our referral in casual conversation, that's like pulling someone off the list, it's still a referral in the concept of how we're trying to define that for this data element. So again, you might need to rename this. If you do a poll version of this, you might need to rename it to say, instead of calling it the referral to permanent housing, you call that an offer of permanent housing or anything that might make more sense in

terms of the language to indicate that this person has been... Their name or number have come up for a permanent housing vacancy. And then you document whether, in fact, they took the vacancy, passed on it or which client ended up actually moving into the vacancy. All of that's fine. However you need to rename or re-orient the data field to align with your system is fine, as long as we understand the date that they got that offer and what the result of that offer was.

0:40:41 JB: We've also gotten questions about documents and follow-up results in this data element. So for example, if you, in particular around the concept of problem-solving conversations, so if you have multiple problem-solving conversations over the course of the client's trajectory, do you just leave that... Do you leave that event open until the client does in fact move on to a different... To a stable housing situation or do you open multiple? We've been recommending recording each problem-solving conversation as a separate event. And then you can kind of disregard documenting a follow-up result if there's a subsequent problem-solving conversation. So, in reporting you would assume that if you had a subsequent problem-solving record, then you can assume that the first record did not result in a stable housing situation because you continue to have that conversation and that would allow you to have multiple agencies documenting problem-solving conversations, but also allow you to see in the system who have already had conversations with those clients.

0:42:01 JB: So again, this is the most generic, or maybe not generic is right word, but it's the most simple step where we just have this one project type collective on one particular project collecting all these data elements. So I'm gonna pause there just with the knowledge that I'm gonna get into more complex structures of data in a second. I do wanna pause there and see what kind of questions we have coming in.

0:42:29 MS: Lots of reporting questions like how to report out of this, but we think also that it would be helpful then move into those next scenarios and kind of show all the scenarios. 'Cause people might be getting locked into like, this is the only way to do it. I don't know. Anybody else?

0:42:56 AM: Yeah, I think I'm just looking at David Tweedy and Keisha Benjamin's questions, and I think both of them are variations of these other models that we have laid out where it's a CE project, and some other projects or no CE project in HMIS. If we take a look at some of those, will clear up those questions.

0:43:25 JB: Okay. Then I'm gonna move through in terms of increasing complexity. So here, you might have more than one agency doing some of these things, but if you have... If you still wanna maintain a single coordinated entry project, that's certainly something you can do. You might have outreach workers doing triage in addition to 211 or instead of 211. You might have multiple agencies doing the housing assessments, but you can still grant them access to that single coordinated entry project if that seems to be the structure that works best for you. Similarly, and we talked about this a little earlier, if you have two phases to your process, you could have two coordinated entry projects set up to represent each phase, or you could have multiple coordinated entry projects because of different geography. But let's get into these ones where there's other project types involved.

0:44:31 JB: So this is something that I think comes up most commonly is that folks don't want their street outreach workers and their emergency shelter staff in particular to kind of have to flip back and forth between two project enrollments as they document stuff about a client. So if you were in

this situation, if you had a street outreach worker who was collecting ongoing contact with a client and at one of those contacts, they conducted a crisis assessment with that client, you would only have to... You could record those contacts in the street outreach project because that's where you're required to collect those contacts. And then you could flip over to the coordinated entry project enrolment and collect the crisis assessment data in there.

0:45:39 JB: Just as a side note, you wouldn't also have to collect the current living situation here, because it's already documented, in that street outreach project enrollment. In coordinated entry projects, you only have to collect current living situation at entry and then if you don't have another place to record it in HMIS. So for example, if you have a non-participating street outreach project they've told you that they've seen the client you work for the coordinated entry projects, or like the staff, the oversight staff, and that client's gonna otherwise fall off your active list. You can use current living situation to reactivate that client, keep them on your active list. But you don't have to record... The same street outreach worker, doesn't have to record a contact in the street outreach projects, and the coordinated entry project.

0:46:26 JB: But if you didn't want that person to have to flip back and forth, you could set it up so that... Sorry. So that you could again, collect a lot of that data in that street outreach project enrollment, you could collect 4-19 in that street outreach project. And if another agency like the 2-11 was directly referring folks over to a special crisis assessment hot spot that only does crisis assessments, you could have that coordinated entry project, running in the background for the centralized portion of your system, but the street outreach projects could be also collecting 4-19, and then in reporting... Again this red boundary represents reporting. You look across both of those in enrollment. So you're seeing people who are handled just by the street outreach project when you look at who got a crisis assessment and you're including those folks who went through that sort of more centralized process. Mary, is that kind of what the specific questions that you were seeing, were getting at, like kind of situation?

0:47:51 MS: Yeah, yeah. And we're still working our way through a lot of these questions. So, thanks for everybody's patience with this. But yeah, it's they're the ones in particular. There's one about the changing...

0:48:10 JB: And then...

0:48:14 MS: Oh, sorry. [chuckle]

0:48:14 JB: No, no, that's great.

0:48:15 MS: No just... Yeah and I think it aligns to this screen or maybe the one before, but just... We have projects set up, different providers doing different things. Do we have to change all of those providers, project type codes to be coordinated entry or can they stay at SO, RH if they're doing this CE data collection that's one take on the variations of questions we're getting.

0:48:46 JB: Yeah, definitely not. Definitely if a street outreach project is doing street outreach work, and they're doing one facet of coordinated entry work like conducting crisis assessments or making crisis fed referrals. You do not need to change their type code. You can either have them switch back and forth between the two enrollments for that particular client and document one... Document the coordinated entry activity in the coordinated entry project, and the street outreach

activity in the street outreach project. Or you could have that all collected industry outreach project as long as your system is capable of looking in that street outreach project for reporting purposes.

0:49:34 JB: And we talked a little bit about this earlier, but there's also situations where really what is centralized in an office with a specific set of staff is really one part of the process or another. So it might make sense to have a coordinated entry project, a dedicated coordinated entry project that is really about just that permanent housing match portion of things. So that full housing assessment, the PH referrals or matching or offers of housing, however you wanna talk about that, and then the results of those referrals. And that... This is the front end of the system is happening on a much more diffused basis and so it might make more sense to have those be just data elements that you add to exist in the street outreach projects or emergency shelter projects.

0:50:28 JB: Where those folks are getting those crisis assessments, crisis referral, problem-solving conversations and those types of things. And that can also work... Again, as long as you can scoop that coordinated entry project up with all of these other project types, you can look at the reporting as it relates to project entry, assessment date, event dates and move-out-date, end of the process dates. Either whether that's because the client disappeared or because they moved into a permanent housing situation. And then I just wanted to talk about this last example. Well, this is the second to last example, because the last example really is the one where we don't have any coordinated entry project at all. And again, this one where you wouldn't have to change any of these project types in your HMIS, you would just add some of these data elements in there.

0:51:37 JB: You really need to have quite good coverage though. And so I think probably what would be most common would be something more like this approach where you have a lot of that happening, with the street outreach projects and Emergency Shelter projects that are in HMIS. But you still have this back-up coordinated entry project, a catch-all project where you would be collecting the same data points for those projects or on behalf of those projects that aren't participating in HMIS the place for them to record their results or for the coordinated entry staff to record the results that they're hearing about in...

0:52:26 JB: Case conferencing setting or if they're open to it, you might invite them to start participating in HMIS by doing some of that data entry directly, but that would obviously if they're not already participating in HMIS that might be a harder sell, that might be a way to open the door to HMIS participation. So those are the examples that I have to talk through. I think at this point it would be good to open it up to questions that are really more rooted in your specific needs out there, so Mary, I'm gonna go ahead and turn it back to you, in terms of asking the question the putting the questions out there. And then maybe all of us.

0:53:11 MS: Sure.

0:53:11 JB: Can kind of jump in just to provide answers.

0:53:17 MS: Yeah, I think actually Ty, has the two questions in. But those are kind of a verbal response. I don't know who is the right person to respond to it but it's this general feeling of like, you guys are saying flexibility instead of you're showing on your slides that flexibility and how this is set up in that continuum clearly that has intent but what about if the vendor isn't able to respond to that level of flexibility, maybe report specifications being finalized and send to the vendor resolves that or maybe it's something that people are preceding that, their vendors can't handle I'm

not sure if that's something we wanna kind of address here or maybe from HUD's perspective, you're saying flexibility, but what if we can't be that flexible locally? It's kind of the sentiment.

0:54:26 AM: I heard HUD. Are you looking for me [chuckle]? I was typing out responses frantically.

0:54:33 MS: I know.

0:54:34 AM: But I'm hearing the Ty's question about maybe the vendors don't have the capability to be as flexible as we were saying, "We can be.

0:54:46 MS: Yeah, Some skepticism around that concept. Yeah.

0:54:51 AM: I think I'd like to hear what Meradith has to say, but I think from our perspective in putting together an APR report, we're trying to actually do the do complicated work on our end to reduce some of the complications for you all. But I think where that really comes in detention is at the point of vendor programming, so it it's safe to have skepticism healthy skepticism but we are going to be working on... Or working with vendors to figure out how to get this done. Meradith I don't know if there's anything that you would add to that.

0:55:44 Meradith Alspaugh: Sure, I think the thing that I would add to that is that we know in the work that we do with writing, programming, specifications with HUD and the standard expectations, this is a different kind of report and it might be a heavy lift for vendors and we're gonna do all that we can to support them. I know HUD is doing what they can to support them also but I hear the questions that you all are presenting and how can we do this if we don't have the reporting specs. What about the reporting specs? And I think that is fair but we are working to get those done as quickly as possible with HUD and we're working to make them as, again, 'cause they're different as easy to use and recognizing the abilities of the vendors and the needs of the communities and HUD.

0:56:35 JB: And Abby I know this is something that we've talked about outside of the public view, but I think there is this tension of wanting to communicate with folks and make sure that they're really understanding the needs on the ground so that the reporting specification can be most functional. It's sort of like this catch 22 or that's not quite the right metaphor, but there's this certain... Logic to it [0:57:09] ____ yeah, where it would be such an ideal world, if HUD was like... Here is exactly the data points we want in a report. No more conversation about this. Just do it in some ways. That's really ideal because it's like, "Oh now we know, and we'll just make our system work like that. But ultimately, if thats the best thing for the...

0:57:31 AM: That would have been ideal five years ago, we're coming in now we're trying to trying to ethically respond to having left it open for a long period of time and introducing the standards. It's not an ideal situation, there's nothing I deal about it. And I think what we've heard from balance of state and any large geographic any areas really that are spread out are broken up into sub-regions within the COC that having that single project is just not possible. And so I think our goal here is to create reporting boundaries that allow us to pick up the required elements at the different points where they might be, where they might be collected because that's how your flow through your system is actually set up.

0:58:42 AM: Sorry, I don't know if that's helpful or if I just completely cut that off. [chuckle]

0:58:49 MS: I mean, it's tough. I think that the answer is tough, and skepticism is healthy. And also gives us a chance to give Meradith and her team and had a chance to work with the vendors to get to a place that's reasonable. And we're here in front of you saying flexibility is key. We're putting that out there because that is a key value to this work.

0:59:15 JB: Another question.

0:59:15 MS: So the questions are... Yeah.

0:59:18 JB: What is kind of the boundaries between coordinated entry and prevention diversion? And so I don't know if we wanna spend a little time time answering that. I mean, what's up on the screen here is pretty intentional. The notion that if you're homeless, you kinda cross into this red boundary of being in coordinated entry, but that there's obviously... There's a lot of people who exist, who might come into that triage function that don't cross that red line. But they have a lot of other stuff going on. I mean, they might be referred to a prevention provider. They might... Or referred outside of continuum, referred to a non-continuing project where you might wanna collect data about them. Abby, do you wanna talk a little bit about our friend? Do you wanna talk a little bit about the requirement side of that piece?

1:00:20 AM: Oh, I would if I hadn't gone back to typing. I'm sorry, can you just briefly say that again? As I'm hitting send on a question.

[overlapping conversation]

1:00:27 JB: Yeah, that's okay. I'm sorry. Called you out first. Folks are asking about what's required in terms of prevention and diversion versus coordinated entry proper, because there's a lot of data collection that happens to the left of this boundary or that could happen to the left of this boundary and would certainly be incredibly informative from OCOC's about who's coming in to ask for assistance.

1:00:54 AM: Yeah, so where we set up the coordinated entry event element, the response categories start with a referral to prevention, and then there is a referral to diversion. There's no dependent response category on the referral to prevention. So we're just at this point, saying, "That's a referral to a prevention project. Call it a day there." But the diversion one, we then have a follow up. Did that person make it into safe housing, or did that household make it into safe housing? We think placing those there, the line varies, depending on the community. But that moment of diverting or rapidly exiting a few days into a shelter stay, those are really important metrics to capture. And so it made sense for us to put them all in that event element. But I'm not sure if I'm exactly answering the question that you're getting at, Jules.

1:02:00 MS: I think that's the heart of the question. I would defer to the person who asked the question if they feel like they need more clarification, but I think that gets to the heart of the question.

[pause]

1:02:21 AM: These questions are so great, and they're so large. [laughter] It takes a little bit of time to read through the questions. Yeah, and that just means this is so important to you guys just as it is to us. So thanks for your patience in our moment of silence as we kind of absorb what it is you're writing and think about how best to respond. And if anybody else wants to jump in, I don't have any additional questions like immediately, but as reading them maybe something will come up.

1:02:56 JB: I have one. It's really kinda... There's a few questions that I think [1:03:05] ____, like what's the difference between crisis versus housing needs assessment? How do you draw the line between crisis needs and housing needs assessment? And do you have to do both? What if your system is really just focused on the front door or the exit point, are you sort of obliged to have both? And I think those are really locally dependent decisions, I would say in general. I don't think you have to have both if your system really doesn't focus on both things. And I think you might find that some of your reporting is gonna look a little skewed in one direction or the other. But if that's consistent with the work that you're doing that you're intending to do, then I think that makes a lot of sense. And again, that differentiation between crisis versus housing needs, I think that's again a really local decision. If you only have one, in some respects, then just pick a title for it. It's really if you need to distinguish, it's because you have both. And then you would make that kind of local decision. Abby, it looks like maybe you've got a question about no wrong door.

1:04:38 AM: Yeah, I was just reading David Tweedy's, but I'm still sort of processing it.

1:04:50 MS: I think it's about needing some extra clarification on... Or I can. I can change the slides myself. Just talking about this last slide, of the examples. So this de-centralized approach, right? If you're thinking about adding 4.19 and 4.20 to all these different providers' assessments, which is what this basically shows. Each of these providers are doing the fun part of the intake assessment referral process. Just trying to figure out what that looks like for them, I guess, David's struggling with... And so any I guess additional words that we could put around that slide or yeah...

1:05:36 JB: Yeah at some point when there's conflicting responses, seems to be a challenge there. When there's so many people potentially collecting data in different project types. How do you determine which is the right answer? And I think that's something we're circling back to this question that we talked about earlier. How do you report on any of this is really gonna end up answering a lot of those questions. Meradith, do you wanna talk about how that's something that might be addressed in reporting specifications and of how you determine which is the right event or moving date or results to consider?

1:06:27 MA: So I'm reluctant to answer that, because I think that's a decision point that we still have to have conversations. HUD has to make those decisions on. But I think that... And I apologize, I heard part of that question, 'cause I was reading another question and thinking about it. Also, sorry, I think though, yeah, I hate that answer. We are considering those things in writing these specifications and have ideas and suggestions and will present options to HUD to consider, but that decision hasn't been made just yet.

1:07:01 JB: But I think ultimately that is the role of reporting specifications. To sort of say like, "Okay, we've got this collection of data, which one takes precedence in a report?"

1:07:13 MA: Mm-hmm.

1:07:14 JB: And I think just, David, to your question, we recognize that answering your question is fundamental to being able to produce a report. And that those ultimately you can't... It's not really reasonable to expect you each as continuum to make decisions about that on your own. 'Cause then we end up with really inconsistent reports, which is the whole point of trying to systematize the data collection, that we're really understanding the same thing, the same moments for clients across all the continuums, regardless of how you describe them or how you implement them, kind of really like "What do we see when a client shows up?", "How long does it take for them to get assessed?", "How long does it take for them to move into housing?", etcetera. All those time points need to be consistent and so the recording really needs to be consistent across CoC.

1:08:20 MA: Yeah.

1:08:27 JB: Okay, Kelly Clark asked a question that is pretty straightforward that I like, I like a straightforward question. Should a client be exited from a CE project in HMIS when they are accepted into a PH project? Or when they physically move into PH unit? I think being housed is the marker of no longer meeting coordinated entry assistance. I would say, move in date.

1:09:06 AM: I have a question that Jack Moren... I hope I'm pronouncing that correctly, wrote in about... It's a question about crisis needs, housing needs and the difference and asking, I thought these were up to local CoC policies. That's still the case, because this presentation and the structure of the data elements, I'll add that part on myself, suggest the use of two assessments, crisis and housing. Is it acceptable to only implement one? So I just wanna talk about that a little bit because there's a lot of policy stuff kind of bound up in that, and I think it's helpful to think through. So when you think about a crisis assessment, it's really... You wanna ask for any assessment, you wanna ask the minimum number of questions necessary to figure out whether that person is going to be prioritized for the intervention, whatever that intervention is. So if you're doing a crisis assessment, you don't... It doesn't need to be a full laundry list of questions, you need to figure out if they need a crisis response. Do they need shelter? Do they need a hotel-motel voucher? Do they need diversion? Depending on how your system is set up. And then housing assessment is more getting at their... Do they have housing barriers, do they have service needs, do they have just straight-up subsidy needs? So there are different sets of things that you wanna be asking now we wouldn't.

1:10:56 AM: We wouldn't require any community to use a particular assessment at any one point, we think that's up to you all, but I am offering that as some stuff to think about, some food for thought. Because I think one thing that we have figured out, now being a couple of years into the implementation of coordinated entry, is that doing a really in-depth assessment right up front doesn't always make sense, often doesn't make sense for a couple of big reasons. One, is that there's a really high rate of people who "self-resolve," just aren't in shelter very long, if they do go to shelter. And so, you've spent a lot of time with that person asking questions, you've potentially done some re-traumatization, and there may be no resources. So, the idea of only asking what you need to know at that point, is really important, and we often talk about this as phased assessments. So, that's why you see those two different types of assessments. I just wanted to provide some policy color context there.

1:12:30 MS: Okay. Things are mostly being answered, or questions are assigned to certain folks to be answered right now. Is there anything, Meradith or Bryan that you can see? Somebody asked and I answered it incorrectly. Tannika asked, and I answered it wrong but corrected it, she asked when

does a CE event end? Jules was in the process of answering when the CE project ends, which is when a client's housed. But the CE event ends basically, if you answered the dependencies about that event. The event is over and if another assessment, or referral, or whatever processed your recording and the event comes up, you would probably record it as second event. I clarified that one, trying to think what else, some of those easy to answer ones. Somebody asked a good one here, the... Oh, yeah?

1:13:36 MA: Abby, I think you're talking but you're on mute.

1:13:40 AM: Yes, I am. I think the last three Michelle, Mike Reed, and Keith Anderson.

1:13:49 MS: I was just gonna get into Michelle's. So, the question is, we inherited CEF and h-client set up from another organization, and it's currently set up this one way, can we set it up a different way? Should we set it up a different way? And I was kind of typing in an answer of, "Think about what your local needs are." And figuring out and going back to these CE project set-up slides, Jules pointed out that the simplest ways to envision coordinated entry as a single project that records it all, that's pretty straightforward and simple. If you're at a place where you have a chance to revision that and wanna take the opportunity to do so, go for it. And making things simpler for yourself isn't a bad thing, but it definitely should be tied to the needs of the local community, and what the existing models are. We don't want folks... We've stated from the beginning, the point is to figure out what you're doing now, and make this work for your local process. If this presents an opportunity to get rid of some onerous data entry stuff that's going on that doesn't need to, or multiple projects are set up and that doesn't need to be the case, definitely, this is a chance to try and figure out what's gonna be best for you. Is my video super slow, I feel like I'm not caught up. My words are not...

1:15:24 AM: A little slippy.

1:15:25 MS: Yeah? I'm good? Okay. Anybody else wanna change, or revise, or add to that answer?

1:15:40 MA: Can I just add, too, because I've seen a couple of these questions come in about exits from coordinated entry, there is some guidance in the data standards manual about access to coordinated entry, so we would encourage you to go take a look at that also. It's at the beginning of the document. Well, depends on how you access it, but it's towards the beginning of the document, not necessarily in the exit section, it's a coordinated entry data collection section. So, we would encourage you to take a look at that, too, I think that might help answer some of the questions we're seeing come in. I also wanna plug, too, I've seen a couple of questions come in that have very specific scenarios, you know, will the APR account for this very specific scenario? And I just wanna reiterate, I don't know that we can answer those questions yet, but your questions are really helpful in helping us process through those. So, if you're not getting a response, it's not that we're ignoring your question, it really is that we don't necessarily know yet, but your question is really good. And it's something we'll think through as we're doing the development.

1:17:00 JB: I think a lot of these exit questions are really addressed to Meradith, as you said, in the data standards. Auto exits probably don't make sense, but some kind of community standard for how long has been since you've seen a client, would make sense. There's no HUD standard for that, it's a community-driven standard. And then, I don't know if anyone can help me interpret Chelsea's question, "Can you explain the difference between our exit date and the move-in date. PH programs

have these two distinct differences. Should they be the same? And if so, why are there two different names for this?"

1:17:52 AM: Is it the coordinated entry exit date and the move-in date of the permanent housing? I'm not sure.

1:18:01 JB: Maybe. I mean there are two different names for it but one of them an exit from one project, and one of them is move in to the other projects. I think they serve distinct purposes. Chelsea, if you have more clarification on what you're driving at, that would be helpful to...

1:18:19 MS: Specifically what does our exit mean. So who's the "our" in that statement, right?

[overlapping conversation]

1:18:29 MS: After PH. Were you going to in that one [1:18:39] ____.

1:18:39 JB: Go ahead with...

1:18:39 AM: [1:18:39] ____ program to a permanent destination trigger and exit from the CE program. And do you foresee this being automated? Who's responsible for exiting of clients from the CE program?" So we're gonna refer you back to the HMIS Program Manual to read some... Or HMIS Manual to read some more information on exiting from the CE Project. And the key statement in there is that the CoC needs to be involved in any of these decisions about what's automated, as far as exits from the CE project go and timeframes around an active client being exited and all that.

1:19:27 JB: And I would really say that that... Automating and exit, I think what you wanna do is plan to do some reporting around people who haven't... Let's say you set a standard of you haven't seen the client in 90 days. If you haven't seen the client in 90 days, you would retroactively set their exit date back to the last time you did see them. But that you would run a report of all the clients who haven't been seen for 85 days and check in and in case conferencing. Has anyone seen these folks? Is this a realistic reflection of who someone who has disappeared? And then I'll also say, from the reporting side of things, I think it would be probably a good thing to imagine that when those specs gets set, that there would be a look at whether a client has a move-in date in a permanent housing project, that that would override a CE Project enrolment that just doesn't have an exit date. Or even has an exit date later than that move-in date. At a certain point, those conflicting enrollments are gonna get prioritized and a move-in date to a permanent housing unit is going to indicate, "Yes, that is clearly the end of that client's engagement with the coordinated entry systems".

1:20:52 MS: Jules, Chelsea clarified her statement so maybe you wanna address that while I address some of these other questions that are spinning off of our conversation right now in writing.

1:21:01 JB: Sure.

1:21:02 MA: Can I jump in there real fast, just because it's sort of in the same topic, too. And I saw Rosie's question come in about automated exits. There's not a standard for automatic exits. That's not something that has been prescribed to vendors. That's not something that necessarily all vendors

can even do with their software. So I think we're talking about like Jules was saying, like a scenario where maybe there's a report or something that flags for you that this needs to happen, some action needs to be taken. But not necessarily that there is some automated process that completely excludes the HMIS user in doing these exits. So I just wanna sort of plug that if that doesn't ring any bells to you or sounds right to you or... That's not something HUD requires and it's not something that vendors are required to do.

1:21:49 JB: And then I'll switch back to Chelsea's question. We have in our permanent housing programs an exit date. How [1:22:00] ____. Okay. So Chelsea, there's three dates that are relevant for permanent housing. There's the project entry date, and that's the date that the client is accepted into the permanent housing project. There's the move-in date, that's the date they actually take their housing unit and move into the physical permanent housing unit that they live in as part of the project. And then there is the project exit date, that would be when they moved out of their permanent housing unit or if it's just a subsidy in a tenant-based unit the subsidy ends, but they continue living in that unit. So move-in date, it always falls between project start date and project end date. Project entry date of the project end. So, the move-in date would be the date that they actually enter a permanent housing unit and we know that in HMIS so that's why it would represent the end of the client's engagement with the coordinated entry system, which has the ultimate goal of getting them into housing. Hopefully that answers your question, Chelsea. I think if you have more questions about those dates, maybe submit them an AAQ to get more clarity on those dates.

1:23:21 MS: [1:23:22] ____ Here's a question: Many of our clients are re-housed through non-traditional services, like church assistance. How do we capture those move-in dates? So, if in your system, you had a move-in date for a particular client into a permanent housing project, that would be a signal that their coordinated entry enrollment had ended. But that's certainly not the only way to end their coordinated entry date. Their coordinated enrollment. You can exit them from coordinated entry and record their destination as a permanent housing destination. So once they actually move into a unit with that church assistance, you would indicate that date as their project exit date from the coordinated entry project, and indicate a destination. If you're collecting those data in another place like Street Outreach, you could exit them from Street Outreach or if they were staying in an emergency shelter, you could exit them from emergency shelter and indicate their destination there.

1:24:31 MS: Okay, we had a question about funding and if their funding impacts, but I'm not sure if it's something that we can address. On the line, Denise says that the Exit participants from CES once they've been enrolled in the referring agency programs as kind of a start date into the project, they don't refer to that's really what creates their exit from CE with appointment information, not necessarily when the client was housed. Again, I think we'll refer you to the HMIS Data Manual that has a lot of information on CE exits and thinking through all of different impacts, exiting and exits from the coordinated entry system implies. Okay, I'm looking looking for open questions or any presenter that feels like there's something that we majorly left off.

1:25:46 MS: We also, as a reminder just to maybe kind of wrap up this call, we're gonna have another one of these tomorrow at the same time, but it will be all the same contents, PowerPoint, the questions might be different, but at the end of this week, early next week, there will be a Q&A posted to the HUD... I mean, to the hub and we will... We've been recording these sessions so we will post those as we normally do. The PowerPoint slides will be available to folks after the calls are over this week. So just as with our other HMIS conversations, we will get this information and

the materials out to you as soon as we can. We'll have Office Hours, a kind of follow-up to this call in a month and open that up again to everyone.

1:26:38 MS: Just one session for that Office Hours session will be more of a discussion-based conversation session, and then let me think what else I wanna say... Oh, if you feel like your issue didn't get addressed or you have more that you need to explain or you just have outstanding questions from this or of course any guidance that you're getting, you can enter in HMIS AQ is always helpful, with you if you reference this phone call, and maybe even a slide number if you have it for where your question is coming from. Don't forget, to join us for the Office Hours next month, and we will continue to post written guidance and further information and give you as much information as we can going forward to help to get some of these issues figured out. Somebody else wanna add anything?