

## How to Guide – Coordinated Entry HMIS Intake Workflow

1. Log in to HMIS using the “**2020 Coordinated Entry**” *workgroup* and your “**Coordinated Entry Region #**” as the *organization*.
2. From the “**Home**” workspace, click on your **initials** on the far top right of *ClientTrack* at the top of the page.

### PROFILE



Grant Peters  
gpeters@ihcda.in.gov  
Indiana HMIS Train

### ACCOUNT SETTINGS

Workgroup

Organization

Location

[Apply](#)

[Open Workgroup Designer](#)

[Security Settings](#)

[Clear Preferences](#)

[Sign Out](#)

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3. From the left hand **“Workspace”** menu, click on **“Clients”**.

The screenshot shows the 'Client Dashboard' for Michelangelo Turtle. The left-hand workspace menu is visible, with a red arrow pointing to the 'Clients' icon. The dashboard content includes:

- Client Information:** Michelangelo Turtle, 123-45-6789, ClientID 1048331, Birth Date 1/1/1990, Age 32, Gender Male, Veteran: Client Doesn't Know, Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x), Race: Client doesn't know.
- Enrollments:** 1 result found.
- Enrollment Table:**

Enrollment Description	Case Members	Project Start Date	Exit Date	Housing Move-In Date	Enroll ID	Exit ID	Exit Des
My Fake Organization ES (ES-R8)	1	10/24/2022			1971910		

URL: <https://clienttrack.eccovia.com/MainPage.aspx?Inline=ton#mo100000094>

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4. Always complete a **“Find Client”** search prior to adding a new client record in HMIS. This will alleviate duplicate client records. Click on the **“Find Client”** feature in the **“Client Workspace”**.
5. Complete the search information (*you may search by name, social security number, date of birth or client ID#*). Next, click **“Search”**

The screenshot displays the HMIS ClientTrack Form interface. On the left is a dark blue sidebar with navigation icons and a list of menu items: Find Client, Coordinated Entry Intake, COVID-19 Intake, COVID-19 Vaccine Intake, Client Dashboard, Edit Client, Client CE Consent Forms, Case Notes, Assessments, Referrals, Housing Program Eligibility and Availability, Services, Enrollments, Family Members, and Paused Workflows. A red arrow points to the 'Find Client' option in the sidebar. The main content area shows a client profile for Michelangelo Turtle with SSN 123-45-6789 and ClientID 1048331. Below this is the 'Find Client' search form, which is highlighted with a red border. The form includes fields for First Name, Last Name, Middle Name, Full Name (Last, First), Social Security Number, Birth Date (with a calendar icon), and Client ID. A red arrow points to the 'Search' button at the bottom right of the form. A 'Cancel' button is located at the bottom right of the entire interface.

Search

Clients / ClientTrack Form

GP

Michelangelo Turtle 123-45-6789 ClientID 1048331

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name:

Last Name:

Middle Name:

Full Name (Last, First):

Social Security Number: --

Birth Date: MM/DD/YYYY

Client ID:

Search

Cancel

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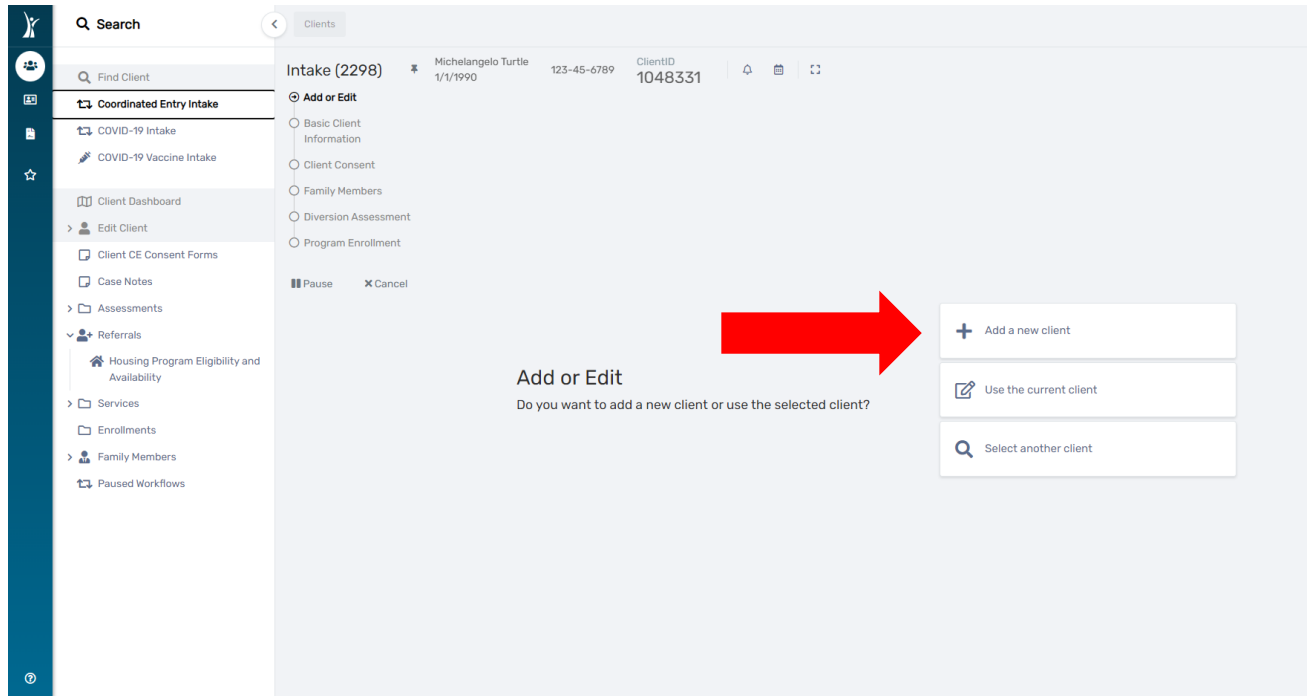
6. If no existing HMIS record is found, click on the “Coordinated Entry Intake” feature in “Client Workspace”.

The screenshot displays the ClientTrack Form interface. On the left is a dark blue sidebar with navigation icons and a list of menu items: Find Client, Coordinated Entry Intake, COVID-19 Intake, COVID-19 Vaccine Intake, Client Dashboard, Edit Client, Client CE Consent Forms, Case Notes, Assessments, Referrals, Housing Program Eligibility and Availability, Services, Enrollments, Family Members, and Paused Workflows. A red arrow points to the 'Coordinated Entry Intake' menu item. The main content area shows a client profile for 'Michelangelo Turtle' with birth date '1/1/1990' and SSN '123-45-6789'. Below the profile is a search form with fields for First Name, Last Name, Middle Name, Full Name (Last, First), Social Security Number, Birth Date (with a calendar icon), and Client ID. A blue 'Search' button is at the bottom right of the form, and a 'Cancel' button is at the bottom right of the page. The URL at the bottom left is <https://clienttrack.ecova.com/MainPage.aspx?inline-top#>.

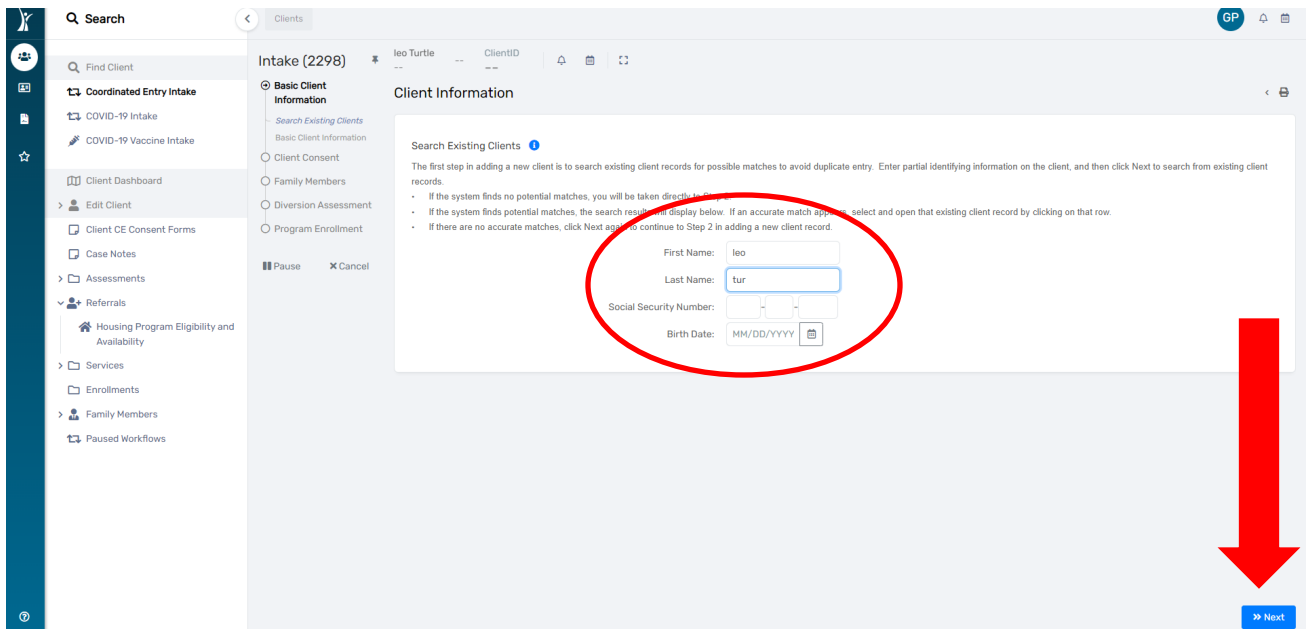
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7. Click on “Add a new client”.



8. The system will perform a search for the client. Type in the first few letters of the clients First and Last Name (e.g., FN: Leo; LN: Tur for Leonardo Turtle) of the new client, then click the “Next” button.



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- If the client is not currently entered in to the HMIS, the intake workflow will begin, and a **“No Duplicates Detected”** message will display on the intake workflow screen.

The screenshot shows the 'Client Information' intake form for a client named 'leo tur'. The form includes fields for First Name, Last Name, Middle Name, Suffix, Name Quality, and Social Security Number. The SSN Quality is set to 'Client doesn't know'. A red box highlights a message in the bottom right corner that says 'No duplicates detected'. The 'Finish' button is also visible in the bottom right corner.

- Basic Client Information Assessment:** Complete all fields marked with a red asterisk \*. Next, click the **“Finish”** button.

The screenshot shows the 'Client Information' form for Anastasia Romanoff. A red arrow points to the 'Basic Client Information' section. The form includes fields for First Name, Last Name, Middle Name, Suffix, Name Quality, and Social Security Number. The SSN is 1111. The Birth Date is 01/01/1970, and the Client Age is 53. The Date of Birth Quality is 'Full DOB Reported'. The Race and Ethnicity is 'Asian or Asian American'. The Gender is 'Woman (Girl, if child)'. A red box highlights the 'Finish' button in the bottom right corner.

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11. Please make sure the client reads the **“Client Consent”** *before* they sign the form. The client will choose one of the three available options in the **“Client Informed Consent”** section of the form. Next, the client will sign the form in the **“Client Signature”** box using the computer mouse or signature pad (*provided by the HMIS team upon request and subject to availability of stock*).

The screenshot shows the HMIS Intake form for Leonardo Turtle (Client ID 1048333). The 'Client Consent' section is active, displaying the following text:

**HMIS Client Consent**

Purpose of this form: This Agency uses the Homeless Information Management System (“HMIS”). HMIS is a database and case management system that collects and maintains information on the characteristics and service needs of clients. The system collects and stores client-level data that can be utilized to generate unduplicated and aggregate reports for the U.S. Department of Housing and Urban Development (“HUD”) that can be analyzed to determine the use and effectiveness of the services being provided by Agency. When you request or receive services, we may collect and share your Protected Personal Information (“PPI”) including data on your household such as:

- \*First name and last names, dates of birth, Social Security Numbers, gender, ethnicity, race, veteran status, prior residence, contact information and program status.
- \*Your service needs, income, government benefits, education, employment, destination, disability, general health, as well as pregnancy, HIV/AIDS, behavioral health, mental health, legal and history of domestic violence, dating violence, sexual assault, and stalking.

How will my PPI be used?

Your data will be entered into the HMIS to generate reports that can be analyzed to determine the use and effectiveness of the services being provided by the Agency. The ways in which this Agency may use or disclose your information are discussed in our Notice of Privacy Practices, which is posted in this Agency near the intake stations (or comparable location) for review by clients.

How will my PPI be protected?

\*We are required to protect the privacy of your PPI by complying with the privacy practices described in our Privacy Policy.  
\*Your information is protected by passwords and encryption technology. Each Agency and user must sign an agreement to maintain the security and confidentiality of your information. Any person or Agency that uses the HMIS and violates the terms of the agreement may lose its access rights and may be subject to other negative consequences.

How will my PPI be shared and disclosed?

The PPI we collect can be shared and disclosed under the following circumstances:

- \* Shared with other HMIS service providers.
- \* To provide or coordinate services to you and your household.
- \* For HMIS administrative purposes.
- \* When required by law or for law enforcement purposes or to prevent a serious threat to health or safety.
- \* Reports to HUD, audits and management functions.

A 'Save' button is visible at the bottom right of the form.

12. Complete the **“Client Name”** and **“Date”** field. Next, you will sign the form in the **“Case Manager Signature”** box. Complete the **“Case Manager Name”** and **“Date”** field. Next, click the **“Save”** button.

The screenshot shows the HMIS Intake form for Leonardo Turtle (Client ID 1048333). The 'Client Informed Consent' section is active, displaying the following text:

be used and disclosed. Every effort will be made to ensure the proper use and security of my information.

**Client Informed Consent**

By signing this form: \*

- I agree that this Agency and its employees and agents can enter all of my information into the HMIS and share my PPI with other HMIS Service Providers
- I will provide my information to the Agency but I do not agree to allow the agency to enter any of my information into the HMIS or share my PPI with other HMIS service providers
- I do not agree to provide any information to this Agency and I understand that I may not be able to receive certain services from this Agency if my eligibility to receive these services cannot be verified

Client Signature: [Signature Box] [Clear Signature](#)

Client Name: \* [Text Field]

Date: \* MM/DD/YYYY [Date Picker]

Case Manager Signature: [Signature Box] [Clear Signature](#)

A 'Save' button is visible at the bottom right of the form. Red arrows point to the Client Signature, Client Name, Date, and Case Manager Signature fields.

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13. **Family Members Assessment:** If no changes are needed, click the **“Save and Close”** button. To add family members, complete the data fields for each family member. Click the **“Check Box”** to the left of the added family member’s name(s) then click the **“Save and Close”** button.

The screenshot displays the 'Family Members' section for client Leonardo Turtle (ClientID 1048333). The interface includes a search bar, a sidebar with navigation options, and a main content area. The 'Family Members' section shows a list of three family members, each with a checkbox, name fields (First, Middle, Last), a suffix field, a name quality dropdown, a birth date field, an age field, and a birth date quality dropdown. The first three entries are highlighted with a red box. A red arrow points to the 'Save & Close' button at the bottom right.

<input type="checkbox"/>	First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date*††	Age	Birth Date Quality*
<input checked="" type="checkbox"/>	Leonardo		Turtle		Full name reported	01/01/1990	32	Full DOB
<input checked="" type="checkbox"/>	Michelangelo		Turtle		Full name reported	01/01/1990	32	Full DOB
<input checked="" type="checkbox"/>	Raphael		Turtle		Full name reported	01/01/1990	32	Full DOB

14. The **“Diversion Assessment”** is a tool to assist with the **“Creative Conversation”** (Diversion) process with the client as you work together to identify possible alternative housing options. Complete the **“Region”** field, then move through the **“Housing Crisis”** fields to capture information pertaining to the client’s current housing crisis.

15. Complete the **“Housing Crisis”** section.

The screenshot displays the 'Diversion Assessment' section for client Leonardo Turtle (ClientID 1048333). The 'Diversion Assessment' title is circled in red. The 'Housing Crisis' section contains several dropdown menus for selecting housing crisis factors. A red arrow points to the 'Housing Crisis' section.

Assessment Date: 10/27/2022

Region: -- SELECT --

Housing Crisis

What brought on your current housing crisis? (Select all that apply)

- Problem with Landlord: -- SELECT --
- Rental or Utility Arrears: -- SELECT --
- Eviction: -- SELECT --
- Foreclosure: -- SELECT --
- Condemned Property: -- SELECT --
- Unable to Pay Rent: -- SELECT --
- Overcrowding: -- SELECT --
- Other: -- SELECT --

DV and Lethality

Are you homeless due to fleeing or attempting to flee domestic violence, sexual assault, stalking or other dangerous or life threatening conditions related to violence against you or your family? -- SELECT --



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- PLEASE NOTE: The “DV and Lethality” section is to be completed for every client as part of the CE Intake Workflow. If the client answers “Yes” to the question: “Are you homeless due to fleeing or attempting to flee domestic violence, sexual assault, stalking or other dangerous or life-threatening conditions related to violence against you or your family?”, the system will display the additional field: “Approximate date homelessness began” (Please complete the date).
- Next, please complete the three “Lethality Questions” by selecting “Yes” or “No” for each question. The system will automatically calculate the “Lethality Score” for the DV survivor and display the “Lethality Score” on the Prioritization List.

The screenshot displays the CE Intake Workflow interface for a client named Leonardo Turtle. The interface includes a search bar, a navigation menu on the left, and a main content area. The main content area is divided into sections: Intake (2298), Basic Client Information, Client Consent, Family Member, and Diversion Assessment. The Diversion Assessment section is currently active and contains the following fields:

- Overcrowding: -- SELECT --
- Other: -- SELECT --
- DV and Lethality: Are you homeless due to fleeing or attempting to flee domestic violence, sexual assault, stalking or other dangerous or life threatening conditions related to violence against you or your family? -- SELECT --
- Diversion Questions: Are you safe in your current living condition? -- SELECT --
- Is there anyone else you could stay with temporarily if you were able to receive case management, transportation and/or limited financial assistance? -- SELECT --
- Diversion: Are you diverting client? Divert Client? -- SELECT --
- Restriction Options

A red arrow points to the "DV and Lethality" section. At the bottom right of the form, there are "Save" and "No Changes" buttons.

- By adding these additional DV questions, CE Lead Agencies will be able to quickly identify DV survivors by the “Lethality Score” displayed on the Prioritization List
- When domestic violence survivors are being assessed, please provide the client with a copy of the Safety Plan located in the Coordinated Entry Policies and Procedure manual. Next, reach out to the nearest DV Provider if the client needs immediate shelter, and offer the client a referral to the DV Provider for DV housing and supportive services.**

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20. Complete the **“Diversions Questions”**. *If the client is diverted, the workflow will end. If the client is **NOT** diverted, the Intake workflow will continue.*

21. Click the **“Save”** button to continue.

The screenshot shows the 'Diversions Assessment' form for client Leonardo Turtle (ClientID 1048333). The form includes sections for 'Overcrowding', 'Other', 'DV and Lethality', 'Diversions Questions', 'Diversions', and 'Restriction Options'. The 'Diversions Questions' section is circled in red and contains the following questions:

- Are you safe in your current living condition?\*
- Is there anyone else you could stay with temporarily if you were able to receive case management, transportation and/or limited financial assistance? :

The 'Diversions' section asks 'Are you diverting client?' and includes a 'Divert Client?' dropdown menu. At the bottom right, there is a red arrow pointing to the 'Save' button and a 'No Changes' button.

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**22. HUD Program Enrollment Assessment:** Click on the drop-down arrow in the **“Project”** data field and choose the project. Next, click the check box to the left of each family member’s name you wish to enroll in the program. Next, click the **“Save”** button.

The screenshot shows the 'HUD Program Enrollment' form for client Leonardo Turtle (Client ID: 1048333). The form includes a 'Project' dropdown menu set to 'My Fake Organization Coordinated Entry (R1a)'. Below this is a 'Household' section with a table of family members:

<input type="checkbox"/>	Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household*
<input type="checkbox"/>	Turtle, Michelangelo	Male	32	MM/DD/YYYY		-- SELECT --
<input type="checkbox"/>	Turtle, Raphael	Male	32	MM/DD/YYYY		-- SELECT --
<input type="checkbox"/>	Turtle, Leonardo	Male	32	MM/DD/YYYY		-- SELECT --

At the bottom right of the form is a blue 'Save' button. Red arrows in the original image point to the 'Project' dropdown, the checkboxes in the table, and the 'Save' button.

**23. Universal Data Assessment:** Complete all fields marked with a red asterisk \*.

The screenshot shows the 'Universal Data Assessment' form for client Leonardo Turtle. A red circle highlights the following fields:

- Assessment Date: 10/27/2022
- Age at Assessment: 32
- Assessment Type: Entry
- Assessor: Grant Peters
- Program: My Fake Organization Coordinated Entry (R1a)
- Disabling Condition: Client Doesn't Know

Other fields include 'Client Location' (IN-502 - Indiana Balance of State) and 'Living Situation' (Prior Living Situation: -- SELECT --). A 'Save' button is located at the bottom right.

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- **Assessment Date** – Date the assessment was completed with the client (field will auto-fill with today's date).
- **Assessment Type** – Defaulted and cannot be changed during the workflow. If you notice that you're completing the incorrect assessment, contact the HMIS Help Desk where you will be assisted.
- **Assessor** – Case manager completing the assessment and who will automatically be assigned to all case members.
- **Program** – Displays the name of the Program in which client is enrolled
- **Disabling Condition** – Enter the client's answer (Yes, No, Client Doesn't Know, Client Prefers Not to Answer, Data Not Collected)

The screenshot shows the 'Universal Data Assessment' form for client Anastasia Romanoff. The form is divided into several sections. The 'Enrollment CoC' section has a dropdown menu set to 'IN-502 - Indiana Balance of State'. The 'Prior Living Situation' section has a dropdown menu set to 'Emergency shelter, including hotel or motel paid for with emergency shelter, such as Host Home shelter'. Below this, there are four more dropdown menus: 'Length of stay in prior living situation' (One week or more, but less than one month), 'Approximate date this episode of homelessness started' (01/01/2023), 'Regardless of where they stayed last night' (Client refused), and 'Total number of months homeless on the streets, in ES, or SH in the past three years' (Client doesn't know). Red circles highlight the 'Enrollment CoC' and 'Prior Living Situation' sections.

- **Enrollment CoC** – Defaulted information that is set up with your program in the system. If this information is missing when completing an assessment, please contact the HMIS Help Desk.
- **Prior Living Situation** – Identify where the client was staying on **the night before** the client is enrolled in your program. The built-in logic will prompt you for more data depending on the selection made for this question. Those additional data elements are the following:
  - **Length of stay in prior living situation**
  - **Approximate this episode of homelessness started.**
  - **Regardless of where they stayed last night – Number of times the client has been on the streets, in ES, or SH in the past three years including today.**
  - **Total number of months homeless on the street, in ES, or SH in the past three years -** Data in this section is used along with disabling condition to determine whether a client is chronically homeless. *HUD strongly encourages HMIS users to just ask the client for the information and record the client's answer. Attempting to tie each individual response with definitions or documentation requirement is not the attempt of this question.*

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**24. Triage Assessment: Please Note: The Triage Assessment is a new assessment implemented with the 2020 HUD Coordinated Entry Data Standards**

The screenshot shows the 'HMIS Triage Assessment' form for client Leonardo Turtle. The form is titled 'HMIS Triage Assessment' and includes the following fields:

- Assessment Date: 10/27/2022
- Assessment Location: My Fake Organization
- Assessment Contact Type: Phone
- What is your household type: Household with children and adults
- Information Date: 10/27/2022
- Enrollment: 10/27/2022 - My Fake Organization Coordinated Entry (R1a)
- Verified by Project: My Fake Organization ES (ES-R8)

The 'Current Living Situation Information' section includes:

- Current Living Situation: -- SELECT --
- Location Detail: [Text Area]
- Record Contact: [Checkbox]

A red circle highlights the Assessment Date, Assessment Location, Assessment Contact Type, and What is your household type fields. A 'Save' button is located at the bottom right of the form.

- Complete the **“Assessment Location”**
- Complete the **“Assessment Contact Type”**: Select the answer from the drop-down box
- Complete **“Current Living Situation”**: Select the answer from the drop-down box
- Complete **“Household Type”**
- Complete **“Information Date”**
- Complete **“Verified by Project”**

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- **You MUST check the “Record Contact” checkbox** (This field is **REQUIRED**, and we are working on adding the **red asterisk \*** as the required field indicator)
- Select the **“Contact Service”** from the drop-down box then click **“Save”**

Intake (2298) Leonardo Turtle 1/1/1990 222-22-2222 ClientID 1048333

Basic Client Information  
Client Consent  
Family Members  
Diversion Assessment  
Program Enrollment

Leonardo Turtle  
New Assessment  
Triage/Current Living Situation  
Complete Housing Needs Assessment?  
Michelangelo Turtle  
Raphael Turtle

What is your household type: Household with children and adults  
Information Date: 10/27/2022  
Enrollment: 10/27/2022 - My Fake Organization Coordinated Entry (Rta)  
Verified by Project: My Fake Organization ES (ES-R8)

Current Living Situation Information  
Current Living Situation: Place not meant for habitation  
Location Details:  
Record Contact:

Contact Service Information  
Contact Service: CE - Case Management  
Location: My Fake Organization  
Comments:

Save

25. **VI-SPDAT Assessment/Housing Needs Assessment:** The system will default to the single Adult, Family, or TAY VI-SPDAT assessment, based on the client(s) enrolled in the project

Intake (2298) Leonardo Turtle 1/1/1990 222-22-2222 ClientID 1048333

Basic Client Information  
Client Consent  
Family Members  
Diversion Assessment  
Program Enrollment

Leonardo Turtle  
New Assessment  
Triage/Current Living Situation  
Complete Housing Needs Assessment?  
Raphael Turtle

Complete Housing Needs Assessment?  
Complete Housing Needs Assessment?

Yes  
No

26. For our client, “Leonardo Turtle” the “VI-SPDAT” was chosen.

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**Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)**

OrgCode Consulting Inc. and Community Solutions are the authors of the VI-SPDAT and F-VI-SPDAT. ClientTrack Inc. is licensed to include these tools within ClientTrack. The terms of this license require that users must be trained on the use and implementation of the tool by OrgCode Consulting, Inc. or an approved and certified trainer of Licensor. It is not permissible to alter the wording or scoring of the VI-SPDAT or F-VI-SPDAT forms without permission and written consent from Community Solutions and/or Org Consulting, Inc.

**Administration**

ClientID: 1048333

Interviewer Name:

Agency:  Team  Staff  Volunteer

Date/Time: 10/27/2022 AM

Assessment Level: Housing Needs Assessment

Enrollment: 10/27/2022 - My Fake Organization Coordinated Entry (R1a)

Interview Location:

Assessment Contact Type: -- SELECT --

Assessment Location: -- SELECT --

**Basic Information**

Name: Turtle, Leonardo

Nickname:

In what language do you feel best able to express yourself?: -- SELECT --

Soc Sec No: 222 - 22 - 2222

Age at Assessment: 32 Birthdate: 01/01/1990 Has Consented to Participate?  Yes  No

Save

**27. Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT) Assessment:** Complete the data fields in the “Administration” and “Basic Information” section. Mark the appropriate check box for the question “Has Consented to Participate”, “Yes” or “No”.

**Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)**

**Administration**

ClientID: 1048333

Interviewer Name: Grant Peters

Agency:  Team  Staff  Volunteer

Date/Time: 10/27/2022 AM

Assessment Level: Housing Needs Assessment

Enrollment: 10/27/2022 - My Fake Organization Coordinated Entry (R1a)

Interview Location:

Assessment Contact Type: In Person

Assessment Location: My Fake Organization

**Basic Information**

Name: Turtle, Leonardo

Nickname:

In what language do you feel best able to express yourself?: English

Soc Sec No: 222 - 22 - 2222

Age at Assessment: 32 Birthdate: 01/01/1990 Has Consented to Participate?  Yes  No

**SCORE:**

IF THE PERSON IS 60 YEARS OF AGE OR OLDER, THEN SCORE 1.

0

Save

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28. The tool will automatically calculate the client’s vulnerability score as each of the answers to each question are completed. When finished, click the **“Save”** button, then click the **“Save and Close”** button



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The image displays two screenshots of a web-based intake form for a client named Leonardo Turtle (Client ID: 1048333). The form is titled "Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)".

**Top Screenshot:**

- Client Information:** Leonardo Turtle, 1/1/1990, Client ID: 1048333.
- Navigation:** A sidebar on the left contains various menu items including "Coordinated Entry Intake", "Client Dashboard", "Edit Client", "Client CE Consent Forms", "Case Notes", "Assessments", "Referrals", "Services", "Enrollments", and "Family Members".
- Form Content:**
  - Question 5: "Have you been attacked or beaten up since becoming homeless?" (Yes/No/Refused)
  - Question 6: "Have you threatened to or tried to harm yourself or anyone else in the last year?" (Yes/No/Refused)
  - Question 7: "Do you have any legal stuff going on right now that may result in you being locked up, having to pay fines, or that make it more difficult to rent a place to live?" (Yes/No/Refused)
  - Question 8: "Does anybody force or trick you to do things that you do not want to do?" (Yes/No/Refused)
  - Question 9: "Do you ever do things that may be considered to be risky like exchange sex for money, run drugs for someone, have unprotected sex with someone you don't know, share a needle, or anything like that?" (Yes/No/Refused)
- Summary Boxes:**
  - IF THE TOTAL NUMBER OF INTERACTIONS EQUALS 4 OR MORE, THEN SCORE 1 FOR EMERGENCY SERVICE USE. SCORE: 0
  - IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR RISK OF HARM. SCORE: 0
  - IF "YES," THEN SCORE 1 FOR LEGAL ISSUES. SCORE: 0

**Bottom Screenshot:**

- Client Information:** Leonardo Turtle, 1/1/1990, Client ID: 1048333.
- Form Content:**
  - Question 8: "Does anybody force or trick you to do things that you do not want to do?" (Yes/No/Refused)
  - Question 9: "Do you ever do things that may be considered to be risky like exchange sex for money, run drugs for someone, have unprotected sex with someone you don't know, share a needle, or anything like that?" (Yes/No/Refused)
  - Section C: Socialization & Daily Functioning
    - Question 10: "Is there any person, past landlord, business, bookie, dealer, or government group like the IRS that thinks you owe them money?" (Yes/No/Refused)
    - Question 11: "Do you get any money from the government, a pension, an inheritance, working under the table, a regular job, or anything like that?" (Yes/No/Refused)
    - Question 12: "Do you have planned activities, other than just surviving, that make you feel happy and fulfilled?" (Yes/No/Refused)
- Summary Boxes:**
  - IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR RISK OF EXPLOITATION. SCORE: 0
  - IF "YES" TO QUESTION 10 OR "NO" TO QUESTION 11, THEN SCORE 1 FOR MONEY MANAGEMENT. SCORE: 0

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The screenshots show the 'Intake (2298)' workflow for client Leonardo Turtle (1/1/1990, ClientID 1048333). The interface includes a search bar, a navigation menu on the left, and a main assessment area.

**Top Screenshot:** Shows questions 12, 13, and 14. Each question has radio button options for Yes, No, or Refused. Below each question is a red box with a score calculation: 'IF "NO," THEN SCORE 1 FOR MEANINGFUL DAILY ACTIVITY.' (Score: 0), 'IF "NO," THEN SCORE 1 FOR SELF-CARE.' (Score: 0), and 'IF "YES," THEN SCORE 1 FOR SOCIAL RELATIONSHIPS.' (Score: 0). The 'D. Wellness' section is partially visible at the bottom.

**Bottom Screenshot:** Shows questions 15, 16, 17, 18, 19, and 20. Similar to the top screenshot, each question has radio button options. Below question 19 is a red box: 'IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR PHYSICAL HEALTH.' (Score: 0). Below question 20 is another red box: 'IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR SUBSTANCE USE.' (Score: 0). The 'D. Wellness' section is at the top of this screenshot.

The navigation menu on the left includes: Find Client, Coordinated Entry Intake, COVID-19 Intake, COVID-19 Vaccine Intake, Client Dashboard, Edit Client, Client CE Consent Forms, Case Notes, Assessments, Referrals, Services, Enrollments, Family Members, and Paused Workflows. The assessment progress bar shows: Basic Client Information, Client Consent, Family Members, Diversion Assessment, Program Enrollment, Leonardo Turtle, New Assessment, Triage/Current Living Situation, Complete Housing Needs Assessment?, and VI-SPDAT (current step).

# How to Guide – Coordinated Entry HMIS Intake Workflow

## Revised: September 2023

The screenshots show the 'Intake (2298)' workflow for Leonardo Turtle (ClientID: 1048333). The interface includes a sidebar with navigation options like 'Coordinated Entry Intake', 'Client Dashboard', and 'Edit Client'. The main content area displays the 'Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)' assessment.

**Assessment Questions and Scores:**

- IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR SUBSTANCE USE. SCORE: 0
- 23. Have you ever had trouble maintaining your housing, or been kicked out of an apartment, shelter program or other place you were staying, because of:
  - a) A mental health issue or concern?  Yes  No  Refused
  - b) A past head injury?  Yes  No  Refused
  - c) A learning disability, developmental disability, or other impairment?  Yes  No  Refused
- 24. Do you have any mental health or brain issues that would make it hard for you to live independently because you'd need help?  Yes  No  Refused
- IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR MENTAL HEALTH. SCORE: 0
- IF THE RESPONSET SCORED 1 FOR PHYSICAL HEALTH AND 1 FOR SUBSTANCE USE AND 1 FOR MENTAL HEALTH, SCORE 1 FOR TRI-MORBIDITY. SCORE: 0
- 25. Are there any medications that a doctor said you should be taking that, for whatever reason, you are not taking?  Yes  No  Refused
- 26. Are there any medications like painkillers that you don't take the way the doctor prescribed or where you sell the medication?  Yes  No  Refused
- IF "YES" TO ANY OF THE ABOVE, SCORE 1 FOR MEDICATIONS. SCORE: 0
- 27. YES OR NO: Has your current period of homelessness been caused by an experience of emotional, physical, psychological, sexual, or other type of abuse, or by any other trauma you have experienced?  Yes  No  Refused
- IF "YES" SCORE 1 FOR ABUSE AND TRAUMA. SCORE: 0

**Scoring Section:**

- Prescreen Total: 0
- PRE-SURVEY: 0
- A. HISTORY: 0
- B. RISK: 0
- C. SOCIALIZATION & DAILY FUNCTIONS: 0
- D. WELLNESS: 0
- PRE-SCREEN TOTAL: 0

The interface also features a 'Save' button in the bottom right corner of each screenshot.

# How to Guide – Coordinated Entry HMIS Intake Workflow

## Revised: September 2023

**Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)**

SECTION	SCORE	Results
PRE-SURVEY	0	
A. HISTORY OF HOUSING & HOMELESSNESS	0	0-3 No housing intervention
B. RISK	0	4-7 An assessment for Rapid Re-Housing
C. SOCIALIZATION & DAILY FUNCTIONS	0	8+ An assessment for Permanent Supportive Housing/Housing First
D. WELLNESS	0	
<b>Grand Total</b>	<b>0</b>	

**Follow-Up Questions**

On a regular day, where is it easiest to find you and what time of day is easiest to do so?

When?  Mornings  Afternoon  Evening  Night

Is there a phone number and/or email where someone can get in touch with you or leave a message?

Phone:

Email:

Photo Permission:  Yes  No  Refused

Prioritization Status: \*

29. To complete the Intake workflow, Click the **“Finish”** button.

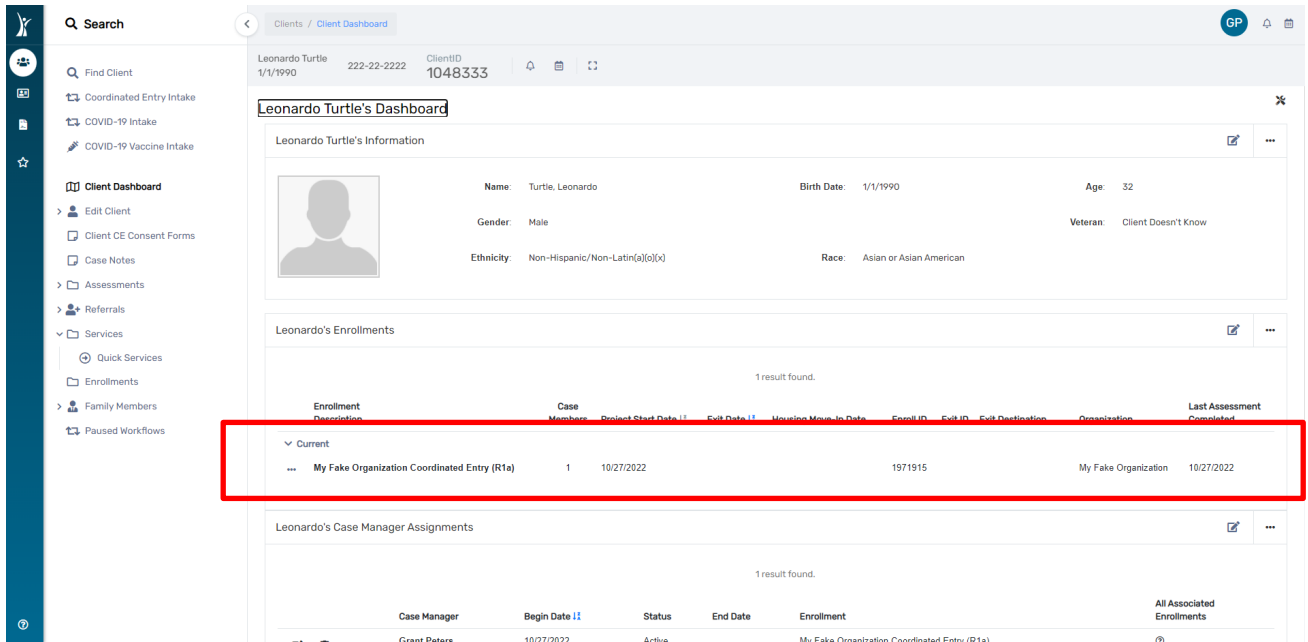
**You're done!**  
All required steps have been completed.

Close the workflow

javascript\_\_doPostBack('c000\$content\$FinishButton','')

**How to Guide – Coordinated Entry HMIS Intake Workflow**  
**Revised: September 2023**

30. The enrollment for Coordinated Entry now appears on the “Client Dashboard”



You have successfully completed the Coordinated Entry Intake workflow. Please contact the [HMIShelpdesk@ihcda.IN.gov](mailto:HMIShelpdesk@ihcda.IN.gov) if you have questions or would like additional assistance.