Alameda CES Work Group

March 20, 10am - 12pm

Logistics

Zoom Meeting Info:

Meeting Link: https://bitfocus.zoom.us/j/613456939
Meeting ID: 613 456 939
Call-In Number: 408-638-0986 or 646-558-8665

Agenda

10:00am	Welcome - this meeting will be recorded	Sara H
10:10am	Update from HUD: Data Standards Timeline	Sara H
10:25am	Show Assessment Revisions • # of household for the AMI calculations	Sara H/Anna
10:55am	CE Event Services • Show sample Navigation Services • Decide on “minimal” problem solving services	Sara H
11:25am	Training Plan • Review Training plan outline	Sara H
11:55am	Next Steps • Next week: Inferred Events	Sara H

Alameda CES Redesign

	Decisions Made	Completion	Next Steps
CONFIGURATION			
Model	One agency, one CE project	100%	● Configure as part of system mock up
Enrollments/Exits	● Standard Alameda template (HUD standard forms) ● Auto-Exits- 180 days ● Cascading- set to 90 days	100%	● Configure as part of system mock up
Current Living Situation	● Use HUD standard form ● Community defined length of time= 90 days	100%	● Configure template as part of system mock up
Assessments	● Slight revisions to question language, streamlining form ● Align questions with HUD standards ● Agency in Assessment Location ● Remove fields for staff Agency and Project ● Disability will be scored on long term response being yes	70%	● Decide on what gets captured in Location ○ Jessie will provide list ● Revisions to assessment ● Household size for AMI ● Configure Assessment Processor
Events - Services	● Relevant events have been identified ● Mock up financial service where applicable for review	70%	● Finalize service list ○ What agencies/programs will we set up HN/PS/Referral services under ○ Decide on “minimal” list of PS services
Events - Inferred	● Two queues - SH/TH, RRH/PH. No individual unit posting, current matchmakers will send referrals. All assessed clients get referred to the queue (“prioritized”) ● Start matchmaking with Berkey- PSH and family shelter ● Providers will process referrals	60%	● Confirm housing inventory is set up in HMIS ● Reconfirm starting w/ Berkeley PSH and family shelter

Reporting/Data Analysis		0%	● Any canned custom reports currently in use? ● Determine current usage by stakeholder group ● Determine needs in order match functionality of legacy format ● What can be configured within embedded DA?
WORKFLOW			
Who does what?	● Enrollments, CLS, Assessments - Assessors ● Event Services - Assessors (and others?) ● Making Referrals (Inferred Events) - Matchmakers (who are they?) ● Processing Referrals - ?	10%	● Determine who is responsible for entering each element above ● Update process flow to reflect each role
Identify knowledge gaps by role (what's new per role)		0%	
COMMUNICATION/TRAINING			
Training and Communication Plan	● Two week intensive training period in May	10%	● Bitfocus will draft training and communication plan for review

PHASE TWO AND BEYOND:

- Auto exits (program and queue)
- Program eligibility

Bitfocus

Alameda CE Training Plan

Training Schedule								
2020	**March**	**APR**	**MAY**	**JUN**	**JUL**	**AUG**	**SEP**	**OCT**
	CES Planning and Work Group	CE Assessment Workflow Training Managing Referrals Matchmaking Training	CES Planning for Phase 2	Open Office Hours for Q&A CES Planning for Phase 2			Refresher Trainings and train new staff	

Assessment Workflow

Training Format: In-Person and Live webinar Trainings (Record training and Supplemental Training Materials)	**Logistics:** **# of trainings- 9-10 (7 in-peron and 3 live webinars)** **Length of session: 3 hours**
Profiles	• Creating profile • Managing households • ROI • What to do if you see duplicate profiles • Contact and Location Information • How to see if client is on the queue • Importance of data quality
Navigating in Clarity	• Switch agencies to complete CE work
Enrollment	• Enrolling clients into participating programs • Importance of data completion and data quality • Purpose of enrollment • Auro-exit threshold
Current Living Situation Assessment	• When to complete the CLS Assessment • Completing the Current Living Situation Assessment • Purpose of the assessment

<table>
<tr><td>CE Assessment</td><td>● Purpose of the CE Assessment
● Walk through how to complete the Alameda CE Assessment
● Importance of data completion and data quality</td></tr>
<tr><td>Referrals to CQ</td><td>● Process of referring clients to queue
● “Checking in”
● Removal from CQ
● Community referral threshold/ Auto-removal from CQ</td></tr>
<tr><td>CE Events / Services</td><td>● How to provide CE Services
● Uploading files</td></tr>
<tr><td>Exit</td><td>● When to exit clients from CE
● How to complete the exit</td></tr>
<tr><td>Reports</td><td>● [GNRL-106] Program Roster
● [RFRL-121] Coordinated Entry Compliance Report</td></tr>
<tr><td colspan="2">Matchmaking Lite</td></tr>
<tr><td>Training Format: In-Person
(Record training and Supplemental Training Materials)</td><td>Logistics:
# of trainings: 1-2
Length of training: 2 hours</td></tr>
<tr><td>What happened before?</td><td>● Context of what happens before this step</td></tr>
<tr><td>Orientation to the queue</td><td>● Navigation between queues
● Agency
● Mode
● Score ranges
● Prioritization of queue/ Display scores</td></tr>
<tr><td>Referrals to shelter or housing</td><td>● How to re-assign a referral
● Referral notes
● History of referral</td></tr>
<tr><td>Removal from CQ</td><td>● How to remove from the CQ</td></tr>
<tr><td>Denial Notifications</td><td>● Receiving notification of denials</td></tr>
<tr><td>What happens Next?</td><td>● Context of what happens after this step</td></tr>
<tr><td>Reports</td><td>● [RFRL-101] Referral Statistics(Outbound)</td></tr>
<tr><td colspan="2">Managing Referrals</td></tr>
</table>

Training Format: In-Person Training (Record training and Supplemental Training Materials)	**Logistics: # of Trainings: 5 (3 in-person and 2 live webinars) Length of training: 2 hours**
Pending Referrals Tab	• How to read the pending referral tab • Green vs. white
Changing the status of referrals	• What does pending vs. pending I/P mean • When to change to pending I/P • How to change the status of a referral
Referral Notifications	• Pending notifications • Pending I/P • Identifying staff to receive referrals
Denying a referral	• How to deny a referral • Reason for denial • Denial message • Send back to the CQ
Accepting a referral	• How to accept a referral • Include household members if applicable
Reports	• [GNRL-106] Program Roster • [GNRL-220] Program Details Report [2019] • [RFRL-101] Referral Statistics(Outbound)

Alameda CES Redesign

	Decisions Made	Completion	Next Steps
CONFIGURATION			
Model	One agency, one CE project	100%	● Configure as part of system mock up
Enrollments/Exits	Standard Alameda template (HUD standard forms)	100%	● Configure as part of system mock up
Current Living Situation	Use HUD standard form	100%	● Configure template as part of system mock up
Assessments	● Slight revisions to question language, streamlining form ● Align questions with HUD standards ● Agency in Assessment Location ● Remove fields for staff Agency and Project	60%	● Decide on what gets captured in Location ○ Jessie will provide list ● Decide on scoring changes around disability ○ Waiting on updates from 3/11 meeting ● Mock up assessment for review ○ Review income logic ● Mock up scoring processor for review
Events - Services	● Relevant events have been identified ● Mock up financial service where applicable for review	70%	● Finalize service list ○ Jessie will review the list to see if any additional services can be categorized as CE Events. Send to BF by Monday 3/16
Events - Inferred	Two queues - SH/TH, RRH/PH. No individual unit posting, current matchmakers will send referrals. All assessed clients get referred to the queue ("prioritized")	20%	● Get clarity around who will **process** referrals ● Confirm timeline for project type participation in referrals through HMIS ● Connect with King County to learn about limiting the queue?
Reporting/Data Analysis		0%	● Any canned custom reports currently in use? ● Determine current usage by stakeholder group ● Determine needs in order match functionality of legacy format ● What can be configured within embedded DA?

WORKFLOW			
Who does what?	• Enrollments, CLS, Assessments - Assessors • Event Services - Assessors (and others?) • Making Referrals (Inferred Events) - Matchmakers (who are they?) • Processing Referrals - ?	10%	• Determine who is responsible for entering each element above • Update process flow to reflect each role
Identify knowledge gaps by role (what's new per role)		0%	
COMMUNICATION/TRAINING			
Training and Communication Plan	• Two week intensive training period in May	10%	• Bitfocus will draft training and communication plan for review

PHASE TWO AND BEYOND:

- Auto exits (program and queue)
- Program eligibility

Alameda CES Work Group

March 13, 10am - 12pm

Logistics

Zoom Meeting Info:
Meeting Link: https://bitfocus.zoom.us/j/613456939
Meeting ID: 613 456 939
Call-In Number: 408-638-0986 or 646-558-8665

Agenda

10:00am	Welcome - Reminder: Meeting is Recorded	Joel
10:10am	Progress Thus Far	Sarah D
10:20am	Check-in: Disability Scoring Progress	Sarah D
11:00am	Assessment Demo	Sara H
11:30am	Inferred Events ● Review inventory in HMIS ● Multiple queues? ● No individual unit posting ● Matchmakers will send referrals	Sara H
11:55am	Next Steps ● Services mock up ● Training plan outline	Sarah D

HMIS Oversight Working Group on CE Restructure
Friday March 13, 2020
Bitfocus' Zoom Conference Room

Present: Nic Ming (City of Oakland), Melissa Sutton Dement (BACS), Juliana Juarez (AbS), Robert Ratner (HCSA), Jessica Shimmin (EOH), Alexis Lozano (EOH), Anna Hung (Bitfocus), Sarah Dougherty (Bitfocus), Sara Hoffman (Bitfocus), Joel Remigio (Bitfocus)

Progress
- See attached

Disability Scoring
- System Coordination Committee agreed to scoring on disabling health conditions that are expected to be long term and substantially impair one or more major life activities, not just the presence of an impairment.

Demonstration of CE Assessment
- Reviewed the CE Assessment and made small adjustments
- Jessie provided the committee with the CE Service events. Robert will review and offer his suggestions. Monday committee members that are interested/available can join a meeting to finalize.