Stabilization Workflow in Cambridge HMIS

Below is a list of procedures and data entry tasks required in order to document services provided to clients housed through Cambridge EHV. Recipients of ARPA funds through the City of Cambridge must comply with this guidance for each client enrolled in their respective project. It is the responsibility of the agency's designated Cambridge HMIS Agency Administrator to ensure compliance with data entry, and the Cambridge HMIS Lead supplies each administrator with the necessary reports to run and submit to the Planning and Development office on a quarterly basis. These reports should be run regularly to monitor program activity and completeness. Any necessary updates or corrections should be made in advance of the 15th of each month that follows the end of the quarter, submitting the required reports no later than:

- October 15
- January 15
- April 15
- July 15

DOCUMENTING ASSIGNED CASES

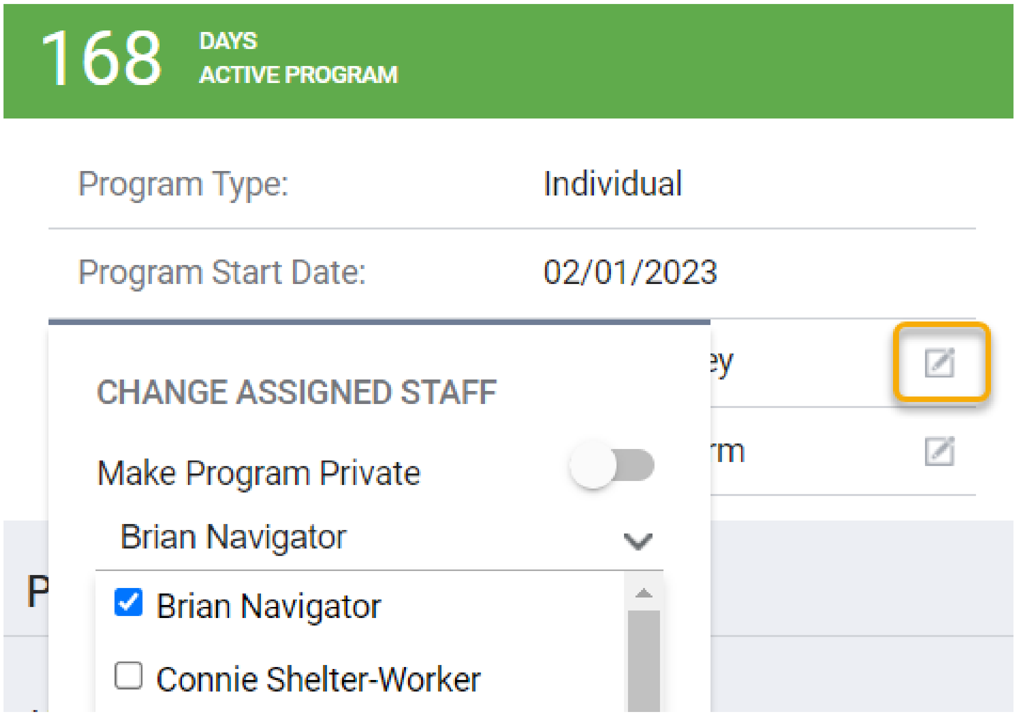
Stabilization workers assigned to client cases are denoted in Clarity in two ways:

- Assigned Staff (within an active project enrollment)
- Contact tab (under global tabs within a client record)

Assigned Staff

When clients are enrolled in a project, the Assigned Staff data element defaults to the person who completed the enrollment. If a client has been enrolled in the project prior to being housed, once they move in and begin working with a stabilization advocate, this field should be edited to reflect the staff person who moves into this role. If needed – during an interim warm handoff (navigator to stabilization worker) – this field can list more than one staff person to denote each person still connected with the client.

It is the responsibility of the program manager and the HMIS agency admin to ensure that this field is updated as needed.



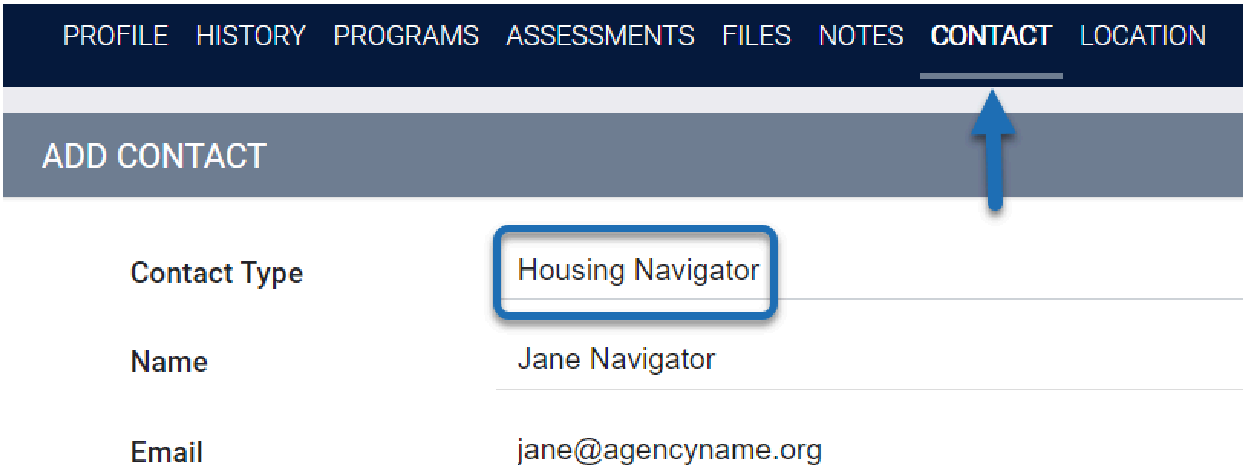
Stabilization workers should make use of the Caseload tab to see their active client caseload, and any staff with a monitoring role should use the canned report *Program Roster* or *User Active Caseload*. Other reports are available under the Data Analysis tab and accessible to the HMIS Agency Administrator and program managers.

Contact Tab

The **contact tab** allows users across our system to see the specific staff, their contact info and particular roles they have in working with shared client cases. Roles specific to ARPA funding and reporting are:

- Housing Navigator
- Stabilization Worker

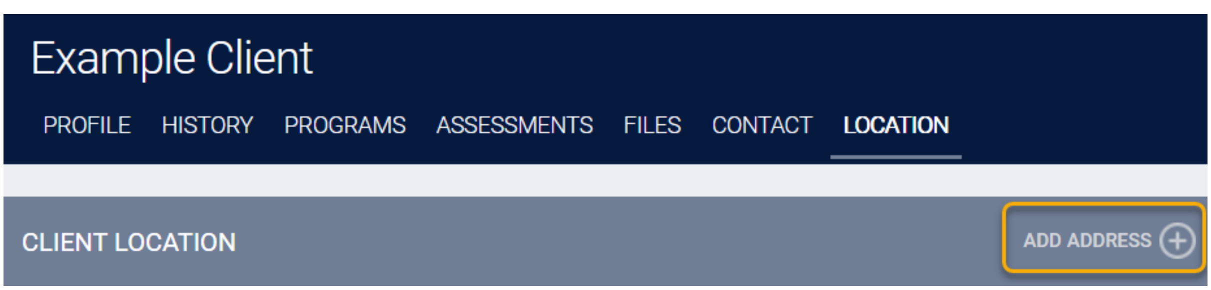
A CCAN (DHSP) staff member will record the Navigator listing when clients are assigned under the Cambridge CAN enrollment in the Coordinated Access agency, but the agency overseeing stabilization services must record this listing for stabilization workers on their team. As with the Assigned Staff field, it is the responsibility of program staff to review this field and make sure it is correct. When a staff person is no longer working with a client, the “Active Contact” field should be toggled off. Since there can be overlap for Navigators and Stabilization workers during the beginning of the post move-in phase, this section can help to highlight this period where a navigator is still working with a newly housed client.

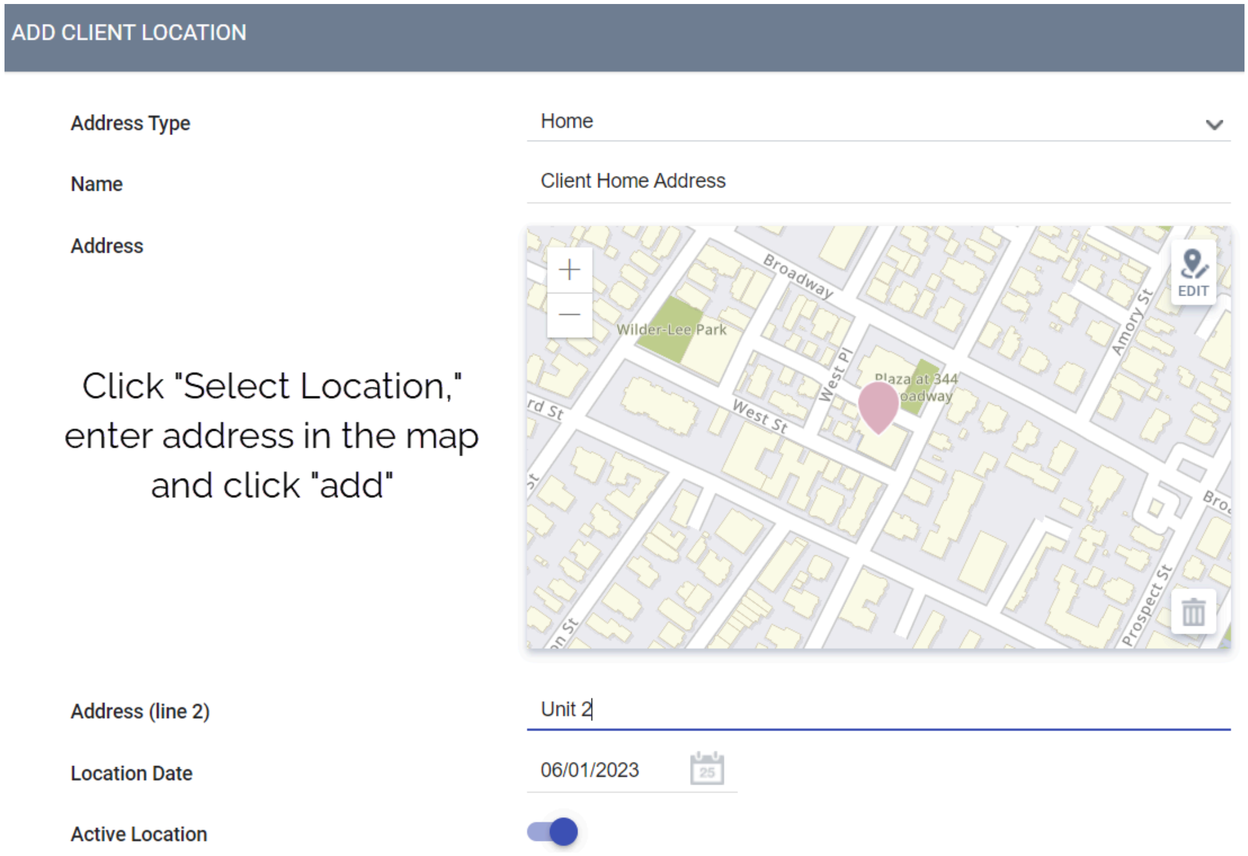


RECORDING/UPDATING CLIENT CONTACT AND ADDRESS

The **Contact tab** is also a place for client contact information, including phone, email, emergency contact, other providers in different CoCs, etc. Because client phone numbers typically change often, staff who are aware of out of order numbers should toggle those listings to "inactive" and add another contact record for the client's new number.

The **Location tab** is used to list a client's current residence. If they change units within the same housing site, update the unit # in the address field and make a note in the text section that the unit has changed. If they move from one housing site/address to another, toggle the former address to "inactive" and add a new address listing for the client. **It is the responsibility of the Stabilization worker to enter the address for each client that has a housing move-in date in their enrollment record.**





DATA ENTRY FOR ACTIVE CLIENTS

Enrollments for Stabilization Clients

If your Housing Navigation and Stabilization program takes on stabilization cases for clients not previously enrolled in your project, i.e., they received navigation services from CCAN or another project, completing the enrollment in the project should be in accordance with the Cambridge HMIS Data Quality Improvement Plan. The plan states the HMIS entry record should be created no later than the 5th business day that the enrollment/beginning of stabilization occurred. The project start date of the enrollment for new stabilization clients should match the date that the agency began providing stabilization services, regardless of when the client was housed. Therefore, if a client was housed prior to the time of the stabilization assignment, the start date should still be the date that services began at your agency. The housing move-in date should match this start date as well in these circumstances. A blank Housing Move-In Date indicates that the client is still experiencing homelessness. More information can be found in the training slides "Housing Move-In Date Explained."

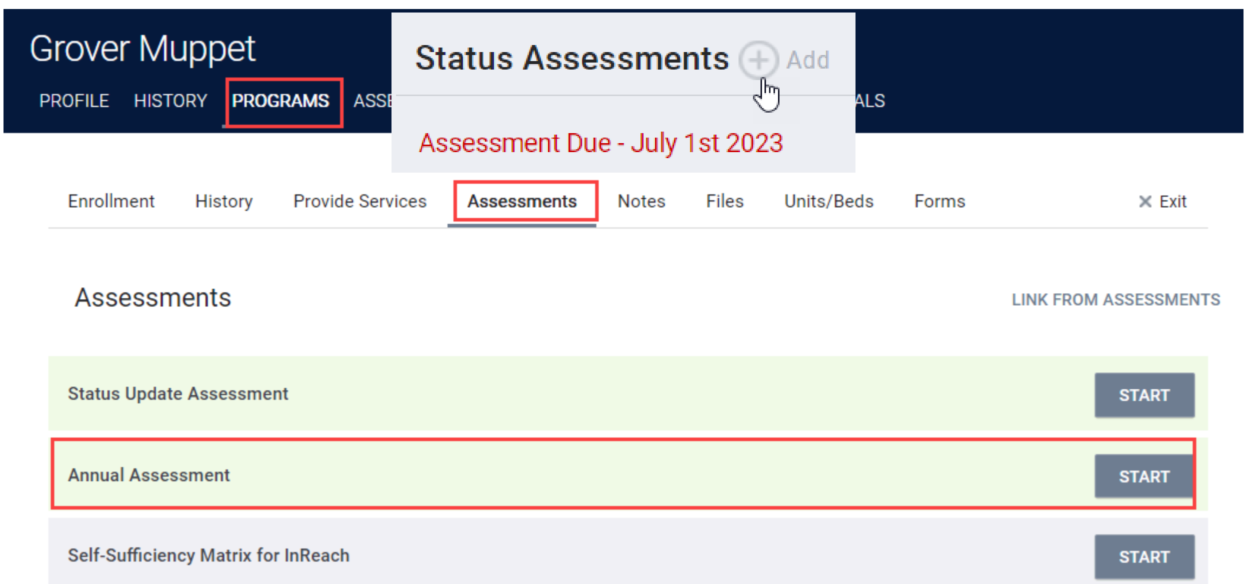
Case Notes

Case notes within clients' enrollment records in HMIS provide documentation that agencies are offering and providing the stabilization services required by the project and grant agreement. Stabilization workers must record these notes within the program notes tab no less than every 30 days. Notes should be entered as promptly as possible and backdating should not exceed more than 7 days of the date of service.

Please Note: Clients who are housed and receiving stabilization do not need further notes on their referral page ("referral notes") because the referral was completed.

Assessments

Annual Assessments should be completed each year the client is still active in the project. If changes - progress or otherwise – are made in the area of disability status, income, non-cash benefits, or healthcare, prior to the one year anniversary that you want to document, please complete a Status Update Assessment screen.



Exiting Clients

If your client is no longer working with your agency within your project, or if they pass away, you must complete an Exit screen in order to end their enrollment and document the date that they stopped receiving services. Basic guidance should be followed:

Rapid Rehousing Projects should exit the client once they are no longer receiving stabilization services from your agency. The exit date recorded in Clarity should reflect the last day they received help from your agency.

Services Only projects should exit the client unless they will continue to work with them to provide navigation services.

If a client in a Rapid Rehousing project loses housing due to eviction or other circumstances, they must be exited from the project with the date that reflects when the client left the unit. If the agency will continue to work with them by re-engaging in navigation services, exit the client and create a new Project Start Date in a second enrollment for the client on the same or following day. Once the client moves into a new unit, record the housing move-in date. Please reach out to Cambridge HMIS support for guidance in this type of situation.

If a client passes away while enrolled in your project, an exit record must be completed within no more than 5 business days of being informed of the death.

The destination answer should be based on the living situation that best matches where the client stays on the night after the last day of receiving services from your project. Please refer to the most recent HMIS Data Standards Manual for specific answer choices listed in *Appendix A – Living Situation Response Categories and Descriptions.* “Other” destinations should be avoided.

SUMMARY OF DATA ENTRY FOR STABILIZATION WORKERS

Check to make sure your name is listed:

- As Assigned Staff under the enrollment (this is how clients get listed under your Caseload tab)
- As Stabilization Worker under the client Contact tab

Ensure that:

- Your client's address is listed under the Location tab
- The enrollment's project start date reflects when your agency began providing services to the client
- Your clients all have a housing move-in date listed on their enrollment screen that reflects the day they physically moved into their unit, or is the same day as the project start if the client was already housed when you began working with them
- You have a case note dated for the first day of working with your client and that you record one at least every 30 days thereafter
- Annual and/or Update Assessments are completed as needed (as described above)