



## **Coordinated Entry Workgroup**

*January 27, 2025/2pm*

Location: ACCESS – Zoom

- **Minutes Approval** – 5 minutes
  
- **Case Conferencing Check-in**
  - **Process observations – follow-ups from last meeting:**
    - **Suggested ways to support meaningful, efficient engagement in Case Conferencing process and understanding the intent/opportunity of the process.**
      - **Create a Case Conferencing set of guidelines/flow that includes specific engagement steps expected from all attendees and the agencies enrolling into current program -**
        - Daphne has been working on a draft that has been shared with the group... some aspects still in process with ACCESS outreach and correlation of all possible areas that agency staff can/would add notes into HMIS that will reflect in our CES reports for case conferencing.
        - Julie to communicate new processes and guidelines to the case conferencing group once finalized.
        - Debbie is looking into the reporting options available but at this point it looks like it is unlikely that we can pull reports that retrieve the notes from all of the locations an agency might add notes for the participant so we'll need to decide what kind of notes we'd like added to the CES notes field. Particularly recent contact dates, brief summary of status, resources shared and next steps if any identified.
        - Coordinated Entry Workgroup to develop guidelines for using the inactive checkbox and adding notes in HMIS.
      - **CES Lead reviews both lists (assigned and unassigned) for glaring discrepancies, opportunities for input from agencies and follows up with the active enrolling agencies to update the records associated with the cases assigned to them – in advance of the session**
        - Julie has begun this process in preparation for January's case conferencing with Debbie and Daphne's support. We now have a way to designate

**CES households as**

- inactive &
- previously case-conferenced and assigned to agencies for outreach and enrollment.
- Melissa to research best practices for handling long-term inactive clients in coordinated entry.
- **CES Lead Communicates/identifies status of enrollments and open slots prior to the session**
  - **Julie has begun this starting January...**
    - OHRA only had 5 open slots remaining - which were assigned for outreach in last cc session.
    - Maslow anticipates being full after their pending cases are enrolled.
    - Pending final numbers from them both to identify how many of the total 50 ORI slots are still unenrolled. (Can ask Katie and Matt/Nicole during today's meeting if they are present)
- **CES Lead/CES Workgroup Chair makes sure that new processes are communicated to all CES CC participating agencies, directly after the workgroup session in which the decisions are made.**
  - **Daphne switching to Julie... has begun**
- **Lead CES Specialist 'drives' the session by systematically naming the next case, asking key questions (some questions were sent, clarifying meaning of comments made and asking if anyone else in attendance is still looking for information to provide.**
  - **Julie moved the list forward at last session with Daphne's support in filling in overall process questions/gaps and offline follow-ups needed.**
    - ACCESS Outreach will be more engaged in future months – reviewing the lists, checking their records and connecting with those they meet in the field and at the Outreach office. Daphne had a conversation with Matt to initiate this.
    - Julie can follow up with Matt's team going forward to move the plan forward as needed.
- **CES Lead/CW Chair asks participating agencies to please review the lists in advance of the session**
  - **Julie has begun doing this**
- **CES Lead/CW Chair asks participating agencies to identify cases for which they have information and ask that they send staff with that information and/or plan to access HMIS and their agency records during the session in order to provide details while discussing each case.**

- Julie/Daphne emphasized this during last session. Will be good to send reminder emails to this effect and send out the guidelines once they are complete.
- Process checks for Workgroup to consider
  - What is total timeframe for outreach to participants assigned for enrollment?
    - What time frame is appropriate for Outreach to attempt to engage a participant through their network in the field? (This follows the 2 weeks and 3 attempts of engagement from all other forms of direct contacts made by assigned agency when possible)
    - What about the all-agency bulletin idea we discussed last meeting? At what point can we (CES Lead) send that bulletin and what agencies should be contacted?
    - What is the follow-up status of the participant record if all attempts return void – inactive list?
      - Per above update – we now can mark a case as inactive.
      - We can check-in in on the previous month's activity during CC session with anything prior confirmed within HMIS/offline with agencies by CES Lead.
  - Requirement for SPDATS to be completed when/before entering applicants into CES?
    - Rogue Retreat does not currently require SPDAT to enter names into CES – what is best approach at this point and going forward until new assessment is designed and implemented?
      - Agencies to complete SPDATs for clients they added to coordinated entry
      - Follow up and check-ins on status with Rogue Retreat by CES Lead will be good.
    - Are we using SPDAT to determine which type of housing supports are appropriate? Do we have the kind of housing supports in our area to refer participants to, if/when we have a system for that?
      - Prioritization as a whole will be included in TA work we do for our guidelines
- TA Updates
  - Melissa to initiate the HUD technical assistance process for developing coordinated entry policies and CoC written standards.
  - Technical Assistance (TA) process, which is expected to be approved soon. The TA will help with the coordinated entry policies and written standards.
- CES and Workgroup organization updates
  - Daphne introduced the changes in the team structure, with Melissa taking over the chair of the workgroup starting February

Next Meeting: 2/17/25 – Via -Zoom