

**OR-505 BOS CoC**  
**HMIS Policies Part 1: Coordinated Entry System (CES) Setup**  
**Board Approved - April 2017**

**Purpose of Policies:** HMIS is backbone of a solidly functioning CES. Adoption of basic HMIS policies (Part 1) will support on-going CES development and encourage continuous feedback looping amongst not only CoC and initial agencies (system workflow) but also with folks entering the homeless system and those who will be diverted into other community supports.

**Source Materials:** HUD materials relevant to developing a CES will be found within the CoC Program Toolkit accessible on HUD Exchange:

<https://www.hudexchange.info/programs/coc/toolkit/responsibilities-and-duties/#coordinated-entry> and include the Coordinated Entry Policy Brief (February 2015) and CPD-17-01: Notice Establishing Additional Requirements for a CoC CES (January 2017).

**CES Implementation Deadline:** As outlined in the HUD Notice mentioned above, deadline for all CoCs to implement coordinated and standardized (and localized) client entry systems is January 23, 2018. Accordingly, ***CoC's CES work will officially begin May 1, 2017***, with the 'kick-off' requirements built into the CoC's HMIS Policies (Part 1) outlined further in this document. Parts 2 and 3 will be implemented in stages up to (and through) the HUD deadline and will likely include the following<sup>1</sup>:

Part 2: community/provider conversations (CoC, OHCS, CAPO/CAAs partnership); HMIS licensing/support

Part 3: agreements/MOUs re: additional entry points, i.e. RHY providers, DV programs

**Training:** As previously announced, an energetic basic training plan is currently under development and which will commence in the following weeks. Please be responsive to scheduling/informational emails.

Initial training will include discussion of the CoC's CES premise and where localized options are possible, an intake/ client entry walk-through in HMIS, including VI-SPDAT, and Q&A. On-site training is possible depending, of course; Zoom webinars will also be available as will a standard recording of intake/entry and VI-SPDAT (TBD).

A CoC Coordinated Entry Standards Manual is currently being drafted and will soon be ready for review and comment.

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<sup>1</sup> Actual steps/action to be taken in HMIS Policies Parts 2 and 3 will be derived from experience and feedback provided during regular reviews of data and workflow.

***Initial HMIS Policy Recommendations  
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1. **Everything in HMIS**. With rare exception, if any, **All** individuals and households seeking housing and supportive services will be entered into SP/HMIS regardless of program enrollment status. *Ensures greater consistency in amounts and types of data being entered throughout CoC<sup>2</sup> (all in vs. only successful exits).*

***Current practice is modified to include only those individuals and households included in Category 1: literally homeless. DV and youth will be specifically added into both outreach and testing in the next quarter.***

2. **Comprehensive and Standardized Assessment Tool**. The CoC's established coordinated entry process must be used to prioritize homeless persons for referral to housing and services within the CoC and its local/regional areas<sup>3</sup>. To that end, an evidence-based assessment tool must be used as part of initial client intake. The CoC's HMIS (ServicePoint) client entry/exit process currently includes electronic versions of the VI-SPDAT<sup>4</sup>.
3. **Data Entry Timeline**. Individual client and household data will be entered into SP/HMIS within three business days (3); data entry requirement for large-mass emergency shelters extends to within five business days (5) for only basic HUD universal data elements and disability information<sup>5</sup>.

This requirement is necessary so that CoC-wide reporting will be consistent and inclusive of all relevant data. *Ensures consistent availability of data for reporting and on-going analyses.*

4. **Releases of Information**. ROIs sufficient to cover all CoC-related reporting and analyses needs should be provided and entered into SP/HMIS for all individual clients and households for **all** homeless programs and SSVF (veterans) and RHY (youth) programs.
5. **Coordinated Entry – Part 1**. Implementation of CoC's coordinated entry standards via HMIS Policies Part 1 – Coordinated Entry Setup (Part 1) will begin Monday, May 1, 2017, with incorporation of above-listed policies into regular intake processes. Initial informational reviews and process update / advancement will occur no earlier than July 1, 2017, and no later than August 1, 2017, and then every quarter year after through end of 2017. During this time, Part 2 will incorporate a robust community and provider engagement, participation, and feedback loop into the CE process resulting in announcement of the CoC's comprehensive coordinated entry system with local/regional points and agreements (Part 3) on or before January 23, 2018.

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<sup>2</sup> Categories 1 and 4 of HUD homeless definition

<sup>3</sup> See Sections II.A.4. and II.B.3. of HUD Notice CPD -17-01.

<sup>4</sup> VI-SPDAT includes individual (2 versions) and family (1 version); the VAT is another recommended tool.

<sup>5</sup> Exceptions/Waivers for vacations, etc. TBD.