

Inactivity Policy Implementation Training Guide

- **Explaining the Inactivity Policy**

- SARA and the CE Advisory Committee have developed a new process to maintain a dynamic waitlist that will only include clients who are actively engaging in services.
 - Any client who has not engaged in service that indicate homelessness (ES, SO, and specific SSO projects) within 30 days will have their Homelink Enrollment closed.
 - Clients have a 30-day grace period to re-engage in services and effectively reopen their enrollment. Once the additional 30 days has passed, the Homelink enrollment will be closed permanently, and the client will have to perform a brand-new assessment if they want to participate in Coordinated Entry once again.
- Every month, program managers will receive a list of clients who have an open Homelink and have not engaged in services in 30 days or longer.
 - Any client on your list will have your program listed as their last service project.

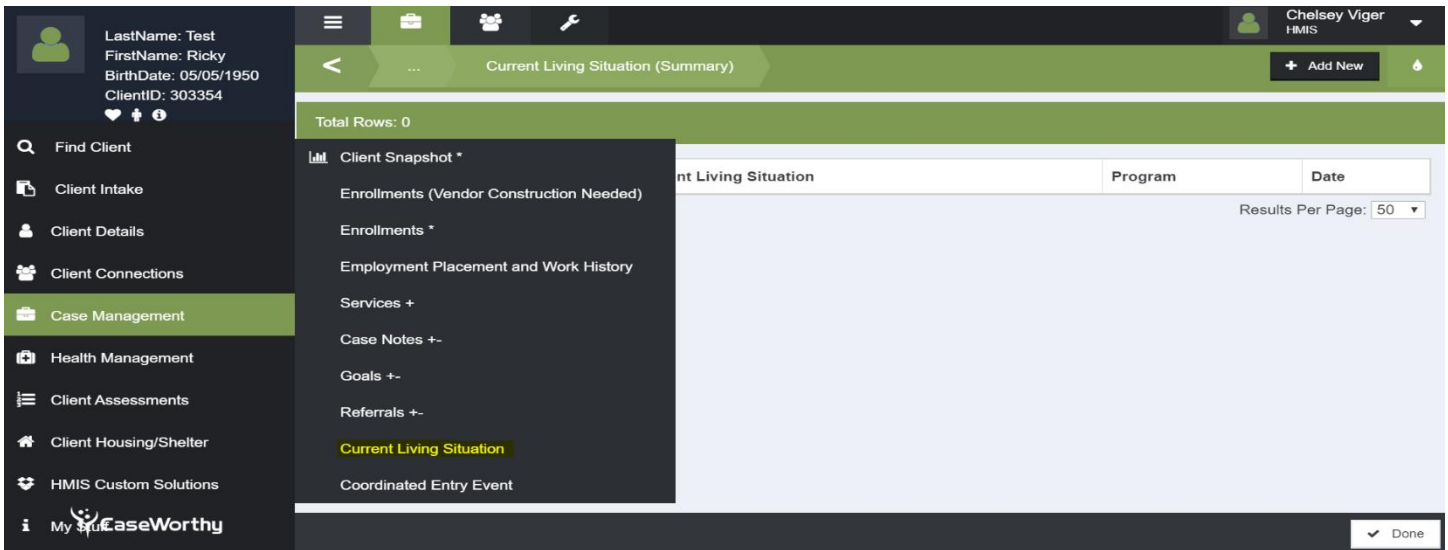
- **How to navigate your inactive list**

- The list will include the client’s HMIS ID, last service date, days since last service, and last service project.
- “**New Last Service Date**” and “**Closed Homelink Date**” are two new columns that we are asking program staff to fill.
 - If a client ***is*** engaging in services, please either enter a service for your project or enter a Current Living Situation (see instructions below) and enter the respective date in the New Last Service Date field.
 - If a client ***is not*** engaging in services, close their Homelink enrollment (see instructions below) and enter the respective date in the Closed Homelink Date.

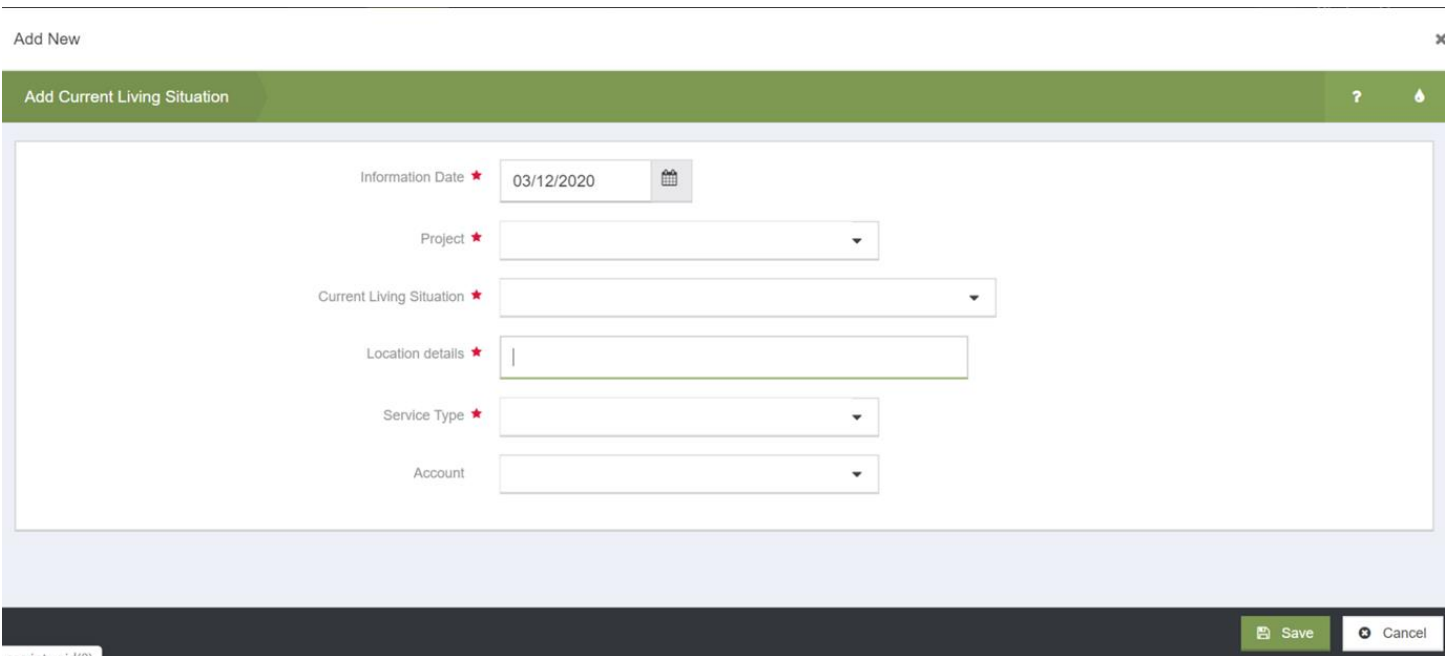
Client ID	Last Service Date	Days Since Last Service	Last Serviced Project	New Last Service Date	Closed SA Homelink Date
74090	8/3/2019	271	H4H Courtyard OSSA		
74179	9/1/2019	242	H4H Master ES		

- **Entering a Current Living Situation (CLS)**

- There is a new feature in HMIS that allows you to enter a Current Living Situation for a client with an open enrollment. A Current Living Situation will be added whenever you have contact with a client, whether in person or via telephone.
- This feature will assist with capturing whether a client is still homeless and actively needing assistance.
- You will find the Current Living Situation under “Case Management”



After clicking, “Add Current Living Situation”, you will see the following questions:

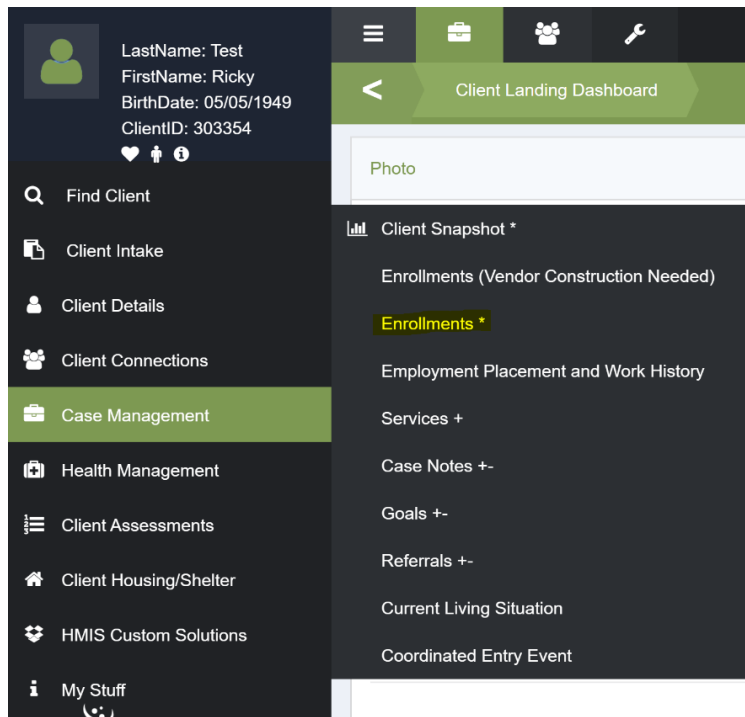


- Under **Project**, you will select their “Homelink” enrollment.

- For **Current Living Situation**, you will see a list of options. Ask the client where they are currently living and select the most appropriate response. The “Living Situation Verified By” is an optional field.
- For **Location Details**, you can include notes on their living situation, if necessary. If you do not find it is necessary to add more information, please enter N/A.
- **Service Type** has the following options: Phone Call; Walk in-Single; and Walk-in Family

- **Closing the Homelink Enrollment**

- If a client is no longer engaging in services, close their Homelink by navigating to “Case Management” and clicking on the “Enrollments” tab.



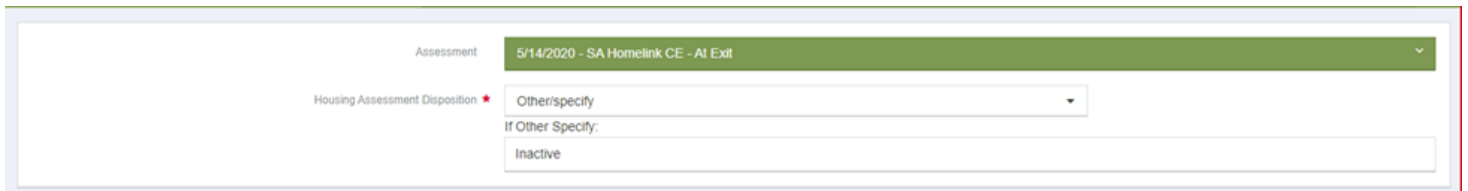
- Once in the enrollments section, locate the open “Homelink CE” enrollment and click on the word “Enrolled.” Click on “Complete exit assessment.”

	Status	Project Assigned Case Mgr	Project Start- Exit Dates
	Enrolled	SA Homelink CE	5/1/2020 - Open
	E		5/17/2019 - Open
	E	c	5/3/2019 - 8/13/2019

- Complete exit assessment
- Complete annual assessment
- View Assessments
- New during program assessment

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- Next click on the “Housing Assessment Disposition” dropdown box and select “Other/specify.” In the box enter “Inactive.”



The screenshot shows a web form with the following elements:

- An "Assessment" dropdown menu with the selected value "5/14/2020 - SA Homelink CE - At Exit".
- A "Housing Assessment Disposition" dropdown menu with the selected value "Other/specify".
- A text input field labeled "If Other Specify:" containing the text "Inactive".

- The next screen can remain as is. All that you will need to do is click the “Save” button. Same goes for the next screen and you will click “Done.” This will close the new window and the Homelink enrollment is now closed.

- **Sending the List Back**

- After you have entered the new data into their respective fields. Please send it back to the Referral System Coordinator and include any questions or concerns you may have.