

# Bed Reservation System Training



**coordinated**  
ENTRY SYSTEM

# Bed Reservation System



- The Orange County Individual Shelter Bed Reservation will be the centralized system where available shelter beds and shelter units participating in CES can be viewed and assigned to via a matching system. This system will compliment Family Bed Reservation System.
  
- The need for the Orange County Individual Shelter Bed Reservation is imperative to creating a more streamlined and accessible process for households to obtain shelter.
  - Will strengthen connection between the case managers and clients, saves client time from calling multiple shelter providers

# Bed Reservation System Roles



- For the Individual Shelter Bed Reservation System, there are three key roles to ensuring the success of the system:
  - Access Points
  - Matchmaker
  - Shelter Providers

# Bed Reservation System Roles



## Access Point

Connects clients to CES and offer additional services

## Matchmaker

Responsible for connecting clients to appropriate shelter options

Matchmaker Agencies:

Family Solutions Collaborative - For Families

County of Orange - For Individuals

## Shelter Provider

Providers shelter beds for households in CES

# Access Point Responsibilities



- Access Points will connect clients to the Coordinated Entry System (CES) and refer clients to the Shelter Bed Reservation Community Queue by completing the Bed Reservation Assessment and completing the Bed Reservation Community Queue process.
- They will also ensure that client's contact information is up to date, confirm current living situation, and update the 'Needs Bed Reservation Assistance' on a weekly basis to keep Bed Reservation referral active.

# Matchmaker Responsibilities



- The Individual Bed Reservation System matchmaker, County of Orange, will identify and prioritize eligible clients and match the eligible clients to the most appropriate shelter bed space available.
- Prioritization will be based on the current CES prioritization of chronic homelessness by length of homelessness, then those who are not chronically homeless by disabling condition, length of homelessness and shelter status.

# Shelter Provider Responsibilities



- Once the shelter receives the match notification from the Matchmaker, Shelter Providers will complete the shelter program enrollment to ensure the client is sheltered.
- Additionally, Shelter Providers are expected to update shelter bed availability as shelter beds become available.

# Bed Reservation System Roles



## Current Shelter Providers Participating in CES:

### American Family Housing

- [Huntington Beach Oasis](#)
- [Anaheim North Harbor](#)

### People Assisting the Homeless (PATH)

- [Yale Navigation Center](#)

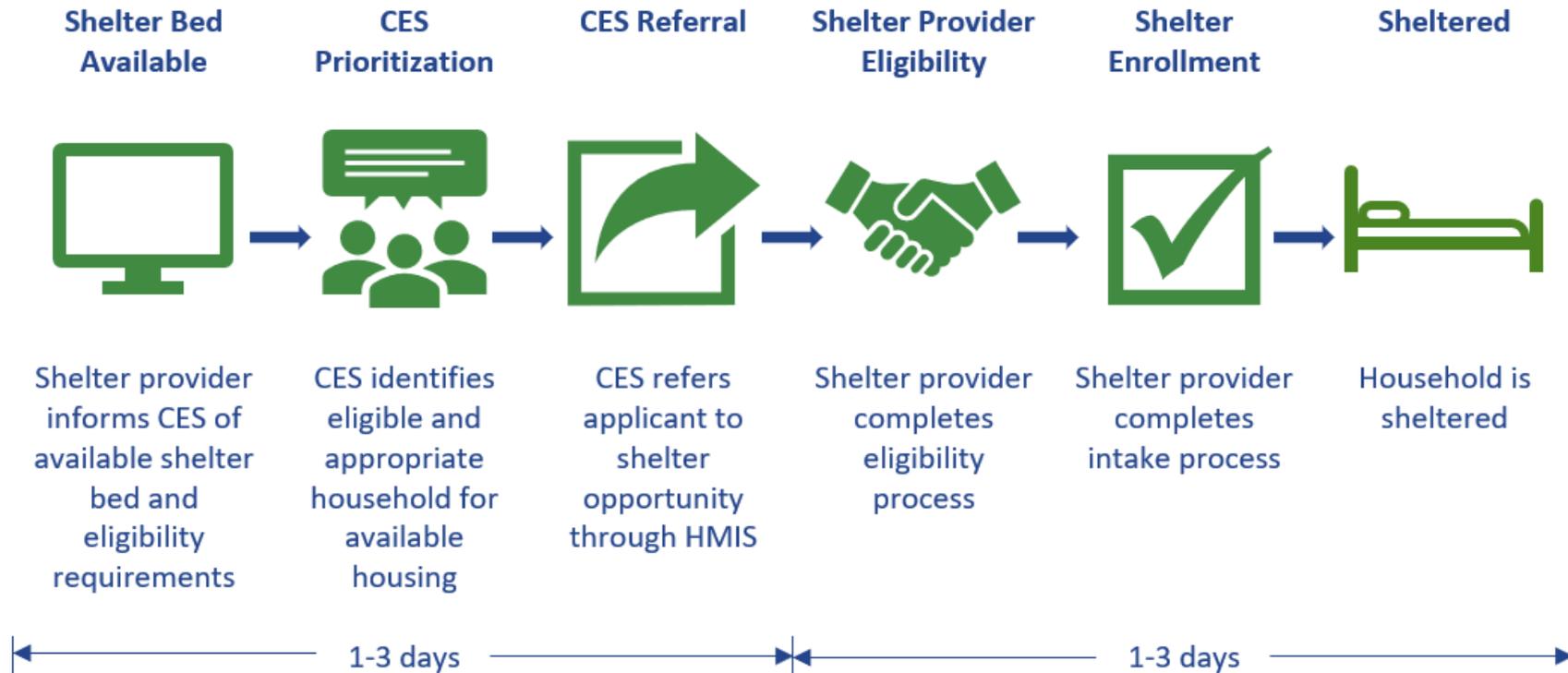
### Mercy House

- [Bridges at Kraemer Place](#)

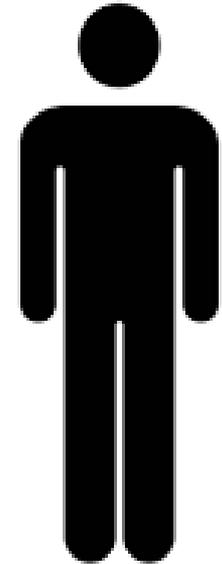
# Timeline



## SHELTER BED RESERVATION TIMELINE



# Access Point Process



## Access Point

Create Client Profile / Update  
Client Profile



Update Contact Information



Complete CES Program  
Enrollment



Complete Current Living  
Situation Assessment



Upload Verification of  
Homelessness



Complete Bed Reservation  
Assessment



Refer to Shelter Bed  
Reservation Community Queue

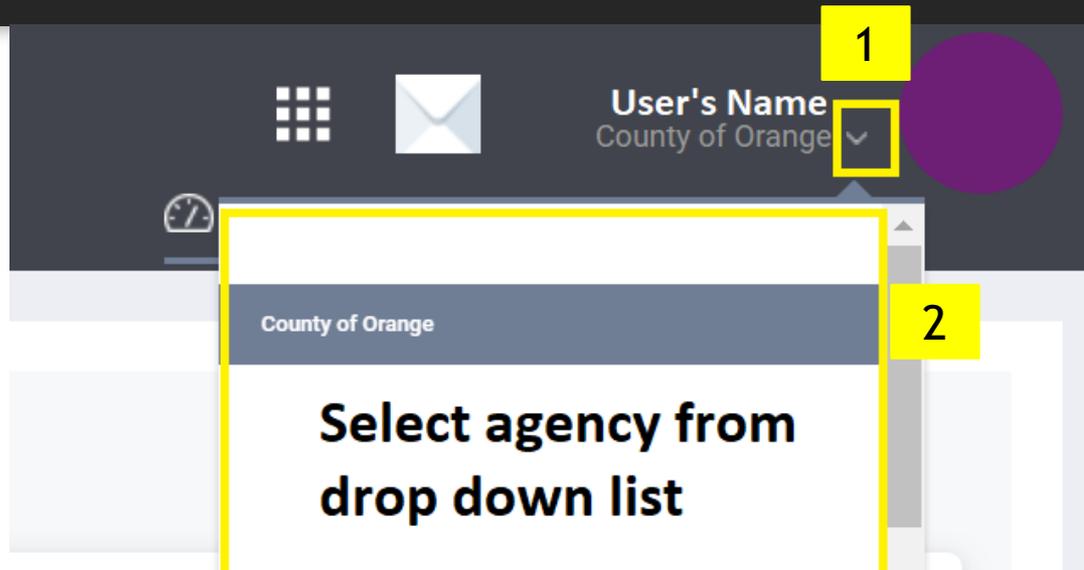


Enter Needs Bed Reservation  
Assistance Weekly



The envisioned workflow for Access Points will be connecting clients to Coordinated Entry System (CES) and offering additional services.

# Switch Agencies and Search



A screenshot of a user profile interface. At the top, there is a dark header bar containing a grid icon, an envelope icon, and the text "User's Name" and "County of Orange". A yellow box labeled "1" highlights the "County of Orange" text, and a yellow box labeled "2" highlights a dropdown arrow next to it. Below the header, a dropdown menu is open, showing "County of Orange" as the selected option. A large text overlay in the center of the dropdown menu reads "Select agency from drop down list".

## Provider Name

SEARCH FOR A CLIENT

ADD CLIENT (+)

Francine

SEARCH

Use full name, partial name, date of birth or any combination.

# Step 1: Create Client Profile/Update Client Profile



Francine

PROFILE HISTORY SERVICES PROGRAMS NOTES FILES CONTACT LOCATION REFERRALS

## CLIENT PROFILE

Social Security Number	XXX - XX - XXXX
Quality of SSN	Data not collected
Last Name	Frensky
First Name	Francine
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	02/28/1988 <span style="float: right;">Adult. Age: 34</span>
Middle Name	
Gender	
Race	



UNIQUE IDENTIFIER  
41B7F1A9A

# Step 2: Update Contact Information



Francine

1

PROFILE HISTORY SERVICES PROGRAMS NOTES FILES CONTACT LOCATION REFERRALS

2

CLIENT CONTACTS

ADD CONTACT (+)

Contact Type	Name	Phone	Email	Date
Client	Francine Frensky	123-456-7891		06/08/2022

- If the participant does not have contact information, the current case manager or alternate contact information should be added.
- Shelter Providers try to reach Shelter referrals through their contact section on HMIS profiles, but some clients do not have any contact information, therefore, a case manager's contact information should also be listed.

# Step 3: Complete CES Program Enrollment



1

PROFILE HISTORY SERVICES **PROGRAMS** NOTES FILES CONTACT LOCATION REFERRALS

PROGRAMS: AVAILABLE

## Individual Coordinated Entry System



- 5 % Families
- 95 % Individuals

2



**Funding Source**  
HUD:CoC – Supportive Services Only

**Availability**  
Limited Availability

### Service Categories:

- ✓ Case Management
- ✓ RETIRED (Coordinated Entry Event)

### PROGRAM AVAILABILITY:

▶ Available openings

3

PRINT DIRECTIONS

**ENROLL**

# Step 4: Complete Current Living Situation Assessment



PROFILE HISTORY SERVICES **PROGRAMS** NOTES FILES CONTACT LOCATION REFERRALS

## PROGRAM HISTORY

1

Program Name	Start Date	End Date	Type
 Individual Coordinated Entry System Coordinated Entry County of Orange 	Date	Active	Individual

2

## PROGRAM: INDIVIDUAL COORDINATED ENTRY SYSTEM

Enrollment History Provide Services Events **Assessments** Notes Files

× Exit

### Assessments

[LINK FROM ASSESSMENTS](#)

Current Living Situation

START

4

# Step 4: Upload Verification of Homelessness



Please upload verification of homelessness before placing the household onto the community queue. The household must have a Homelessness Verification or Chronically Homeless Verification form on file in HMIS.

PROFILE HISTORY SERVICES PROGRAMS NOTES **FILES** CONTACT LOCATION REFERRALS

CLIENT FILES **1** ADD FILE (+) **2**

UPLOAD A FILE

Category Coordinated Entry Documentation **3**

Predefined Name Homelessness Verification: Third Party

File

Trouble attaching files? Switch to the Basic Uploader

Private

**4**

# Step 5: Complete Bed Reservation Assessment



1

PROFILE HISTORY SERVICES **PROGRAMS** NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: INDIVIDUAL COORDINATED ENTRY SYSTEM

2

Enrollment History Provide Services Events **Assessments** Notes Files

X Exit

## Assessments

[LINK FROM ASSESSMENTS](#)

Current Living Situation

START

Status Update Assessment

START

Annual Assessment

START

[OC Custom] Individual Bed Reservation Assessment

3

START

# Step 5: Complete Bed Reservation Assessment



PROFILE HISTORY SERVICES **PROGRAMS** NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: INDIVIDUAL COORDINATED ENTRY SYSTEM

Enrollment History Provide Services Events **Assessments** Notes Files

X Exit

[OC CUSTOM] INDIVIDUAL BED RESERVATION ASSESSMENT

Assessment Date	02/27/2023 
Assessment Level	Select 
Assessment Location	Select 
Assessment Type	Select 
Has anyone in your household ever been convicted of a felony?	No 
Does anyone in this household currently have an open warrant?	No 
Is any adult in the household a registered sex offender?	No 
Does the household require any special accommodations?	No 
Do you require a mobility accessible unit due to a physical disability?	<input type="checkbox"/>
Do you require a sensory accessible unit due to loss of hearing or sight?	<input type="checkbox"/>

SAVE

CANCEL

\*Examples of questions that will be asked, this does not include all the questions

# Step 5: Complete Bed Reservation Assessment



For any households that may require mobility or sensory accommodations, please ensure that following questions are answered on the Bed Reservation Assessment:

- Do you require a mobility accessible unit due to a physical disability?
- Do you require a sensory accessible unit due to loss of hearing or sight?

PROFILE HISTORY SERVICES PROGRAMS NOTES FILES CONTACT LOCATION REFERRALS

[OC CUSTOM] INDIVIDUAL BED RESERVATION ASSESSMENT

Do you require a mobility accessible unit due to a physical disability?



Do you require a sensory accessible unit due to loss of hearing or sight?



# Step 6: Refer to the Shelter Bed Reservation Community Queue



Enrollment

History

Provide Services

Assessments

Notes

Files

Forms

✕ Exit

## PROGRAM ELIGIBILITY DETERMINATION



Bed Reservation

1

REFER DIRECTLY TO COMMUNITY QUEUE(S)

2

# Step 6: Refer to the Shelter Bed Reservation Community Queue



When adding onto the Community Queue, there is the option to include additional notes if necessary, such as additional information on the client's accessibility needs

REFERRAL: ADD TO CQ

Send to Queues

Bed Reservation

Referred Program

Community Queue

Referred to Agency

Community Queue

Referring Agency

County of Orange

Private



needs ramp for wheelchair access|

SEND REFERRAL

CANCEL

# Step 7: Enter “Needs Bed Reservation Assistance” Weekly



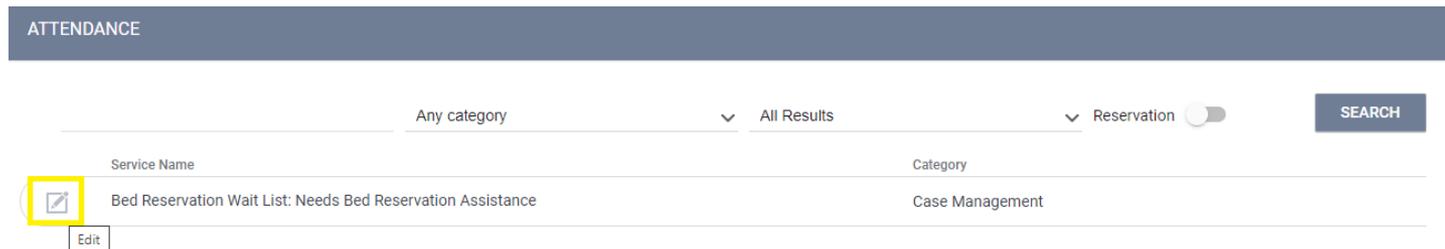
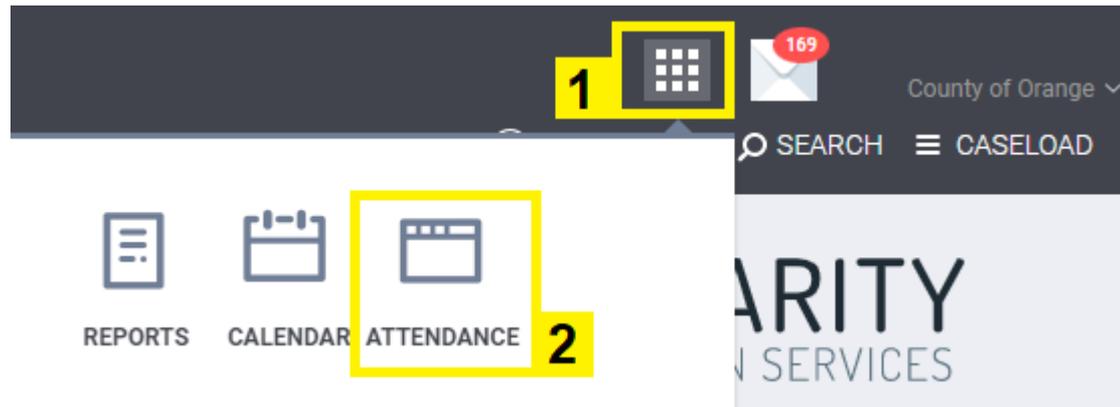
Access Points are to ensure that Bed Reservation services are updated at minimum every 7 days to keep the referral active in the Bed Reservation System.

The screenshot shows a web application interface. At the top, a dark navigation bar contains several menu items: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a yellow box and a yellow callout '1'), NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a blue header bar displays "PROGRAM: INDIVIDUAL COORDINATED ENTRY SYSTEM". A secondary navigation bar includes Enrollment, History, Provide Services (highlighted with a yellow box and a yellow callout '2'), Events, Assessments, Notes, Files, Forms, and an Exit button. The main content area is titled "Services" and contains a "Bed Reservation Wait List" section (highlighted with a yellow box). This section includes a "Needs Bed Reservation Assistance" card with a title and an upward arrow. The card displays "Start Date: 12/14/2022" and "End Date: 12/14/2022", each with a calendar icon. A "SUBMIT" button (highlighted with a yellow box and a yellow callout '3') is located at the bottom right of the card. In the top right corner of the main content area, there is a "Case Management" dropdown menu.

# Provide the "Needs Bed Reservation Assistance" service to Multiple Heads of Household



Access Points can also provide the "Needs Bed Reservation Assistance" service to Multiple Heads of Household at one time



# Provide the "Needs Bed Reservation Assistance" service to Multiple Heads of Household



Ensure the Date field matches the current date and click on the Add button for each Head of Household to which you would like to apply the Needs Bed Reservation Assistance service.

Date 10/03/2022 

Date

Manual

## In Attendance

Client Name	Last 4 SSN
-------------	------------

## Clients from last 4 Months

Client Name	Last 4 SSN	
Ballerina, Tina	0000	Add
Fakesapd, Fakesapd	4890	Add
Farquaad, Lord	0000	Add
Panther, Black	0000	Add

# Provide the "Needs Bed Reservation Assistance" service to Multiple Heads of Household



If the Head of Household is not listed under the Clients from Last 4 Months section, enter the first two to three letters of the Head of Household's first and last name, and click on Search. When the Head of Household appears, click on Add.

BED RESERVATION WAIT LIST: NEEDS BED RESERVATION ASSISTANCE

Date 10/03/2022  Date Manual Scanned

In Attendance	
Clients Name	Last 4 SSN

Clients from last 4 Months		
Clients Name	Last 4 SSN	
Client, Z	0000	
Waiialiki, Chief Tui	6363	Add
Waiialiki, Moana	4712	Add

Client Search

cap maif SEARCH

Clients Name	Date of Birth	Last SSN	
Marvel, Captain	06/19/1944	0000	 Add
Marvel, Captain	02/02/1970	0000	Not Enrolled

# Keeping the client active



Service Name	Start Date	End Date
<b>Referral: Bed Reservation</b> County of Orange referral to Community Queue ⓘ	02/28/2023	<b>Pending</b>

If the referral is not updated on a weekly basis, it will expire. Head of households that have not had any activity in HMIS in the previous seven (7) days will automatically be removed from the Bed Reservation Community Queue

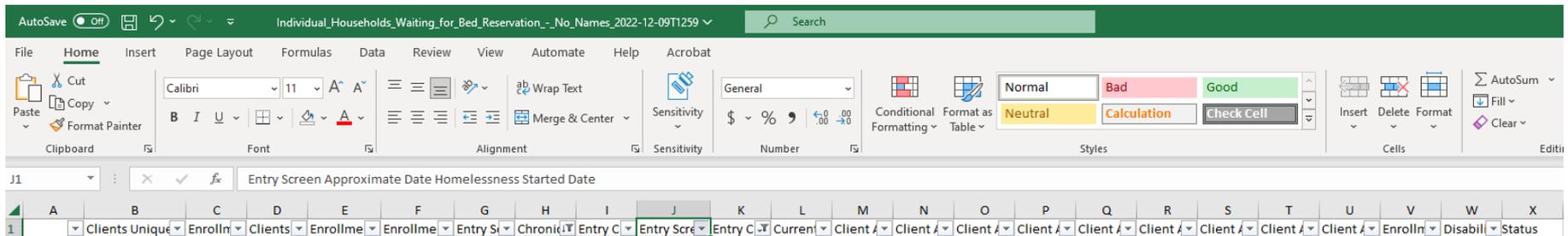
Service Name	Start Date	End Date
<b>Referral: Bed Reservation</b> County of Orange referral to Community Queue ⓘ	02/21/2023	<b>Expired</b>

# "Needs Bed Reservation Assistance" service



If the client does not have the “Needs Bed Reservation Assistance” service, the client will not appear as active in the Bed Reservation Community Queue and client will not appear in the “Individual Households Waiting for Bed Reservation – No Names” report that the Matchmaker receives.

If the client is not on the report, the client will not have the opportunity to be matched to a shelter bed space.



# "Needs Bed Reservation Assistance" service



There are reports available in HMIS that can be run to confirm who is on the Bed Reservation Community Queue and who needs a Bed Reservation Service added weekly to continue to be considered for shelter bed referrals. The **Individual Households Waiting for Bed Reservation** and **Individual Data Entry: Needs Bed Reservation Assistance Service** Report is a by-name list of participants active in CES with the Bed Reservation Assessment completed that do not have a Needs Bed Reservation Service entered in the previous week.

The screenshot displays the County of Orange HMIS Data Analysis interface. The top navigation bar includes "REPORT LIBRARY", "EXPLORE", and "DATA ANALYSIS" (highlighted with a yellow box and labeled "3"). A dropdown menu is open, showing "REPORTS" (highlighted with a yellow box and labeled "2") and "CALENDAR". Below the menu, the "Built In Reports" section shows "Orange County Clarity System Reports" with 139 report(s) (highlighted with a yellow box and labeled "4"). The bottom section shows the "Orange County Clarity System Reports" list with 152 report(s). The table lists reports with "RUN" buttons:

Report Name	Action
Individual Bed Reservation Available Housing Opportunities	RUN
Individual Data Entry: Needs Bed Reservation Assistance Service	RUN (highlighted with a yellow box)
Individual Households Waiting for Bed Reservation	RUN

# "Needs Bed Reservation Assistance" service



If an Access Point would like to subscribe to the Bed Reservation Reports, the Access Point would need to contact their HMIS Agency Administrator. The HMIS Agency Administrator can submit a request to the HMIS Helpdesk for the Access Point to receive the "Individual Households Waiting for Bed Reservation" and "Individual Data Entry: Needs Bed Reservation Assistance Service" reports.

**2-1-1** | OC HMIS Help Desk

NOTE: Please make sure that no client identifying information (name, date of birth, or Social Security Number) appears in the body of your ticket submission or any attachments. Tickets containing client identifying information will be deleted and you will need to submit a new ticket.

See the [Sending Client Information to the HMIS Help Desk knowledge base article](#) for more information.

Only designated Agency Administrators should submit tickets to the HMIS Help Desk

### Submit a Ticket

Ticket Details

Category\*  
.....

Subject\*  
Enter subject

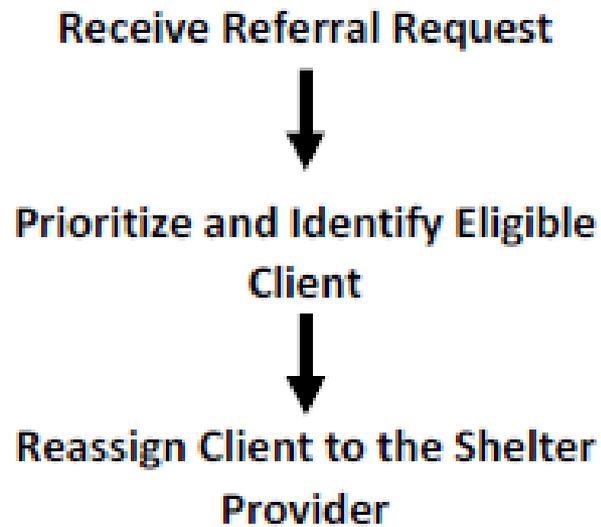
Message\*  
B I U Font Size A A :: Ix + +

# Matchmaker Process





## Matchmaker

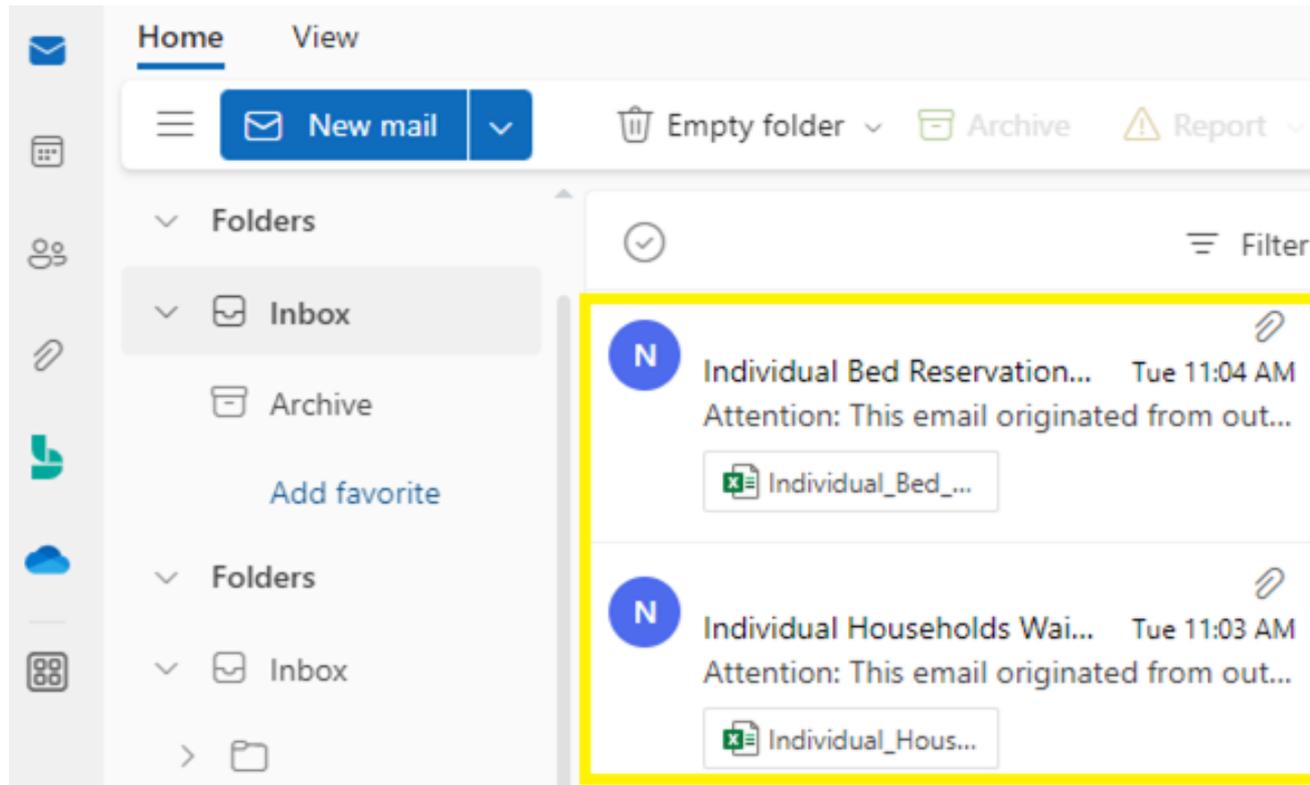


The envisioned workflow for the Matchmaker will be matching the eligible clients to the most appropriate shelter bed space.

# Step 1: Receive Referral Request



The Matcher will open the Bed Reservation Reports by reviewing the daily 11 a.m. email which contains the “Individual Bed Reservation Available Housing Opportunities” and “Individual Households Waiting for Bed Reservation – No Names” reports.



# Step 2: Prioritize and Identify Eligible Client



The Matcher will identify eligible clients and match the clients to the most appropriate shelter bed space by prioritizing based on the current [CES prioritization](#).

County of Orange

DASHBOARD SEARCH CASELOAD REFERRALS

## REFERRALS

Pending **Community Queue** Completed Denied Sent Availability

### Community Queue

Bed Reservation Coordinated Entry System

Eligible Clients Only

Mode Standard

Search Characteristic -- Select --

Active Agency County of Orange Sort By Client Name

SEARCH

Client	Referral Date	Days Pending
Client Name Referred by: County of Orange	09/22/2022	83

Donut chart showing referral status: Pending (63), Completed (392), Expired (18)

- Pending
- Completed
- Expired

# Step 3: Reassign Client to the Shelter Provider



## REFERRALS

Pending **Community Queue** Completed Denied Sent Availability

## REFERRAL: ASSIGN

Client Arthur Read  
Referred to Community Queue - Bed Reservation  
Referring Agency County of Orange  
Referred Date 12/14/2022 9:12 AM  
Days Pending 0 day(s)  
Qualified Yes  
Last Activity 12/14/2022 **CHECK-IN**  
Referred by Staff Access Point - Staff Name  
Navigator **ASSIGN NAVIGATOR**  
Private

**SAVE CHANGES**

**CANCEL**

## REASSIGN

Program **1** Program Name/Emergency Shelter Name  
Opening **2** 12/14/2022 12/14/2022 (North SPA) Single Room Occupancy, Non-ADA Roc

**3**

**SAVE CHANGES**

**CANCEL**

# Match Email



Once the participant is matched to a housing opportunity, the Matchmaker will send an email to the Agency Administrator at the referring Shelter and the Access Point notifying them of the match that was made.

[Shelter] MATCH: Shelter Name # Client HMIS ID



CoordinatedEntry

To: Access Point Case Manager/ Care Team on HMIS

Cc: Shelter Staff



Flyer



Hello,

The participant below has been matched to shelter at [Shelter Name](#) :

# Client HMIS ID

The participant will have 3 business days to confirm their interest in completing the shelter intake.

CES ACCESS POINT NEXT STEP: Please contact the participant about the shelter match and help them contact Shelter Staff via phone call at # Shelter Staff number or email at [Shelter Staff email](#) to schedule an intake appointment. If the participant is not interested in this shelter referral, please reply to this email as soon as possible.

SHELTER NEXT STEP: Please contact the participant to schedule an intake screening.

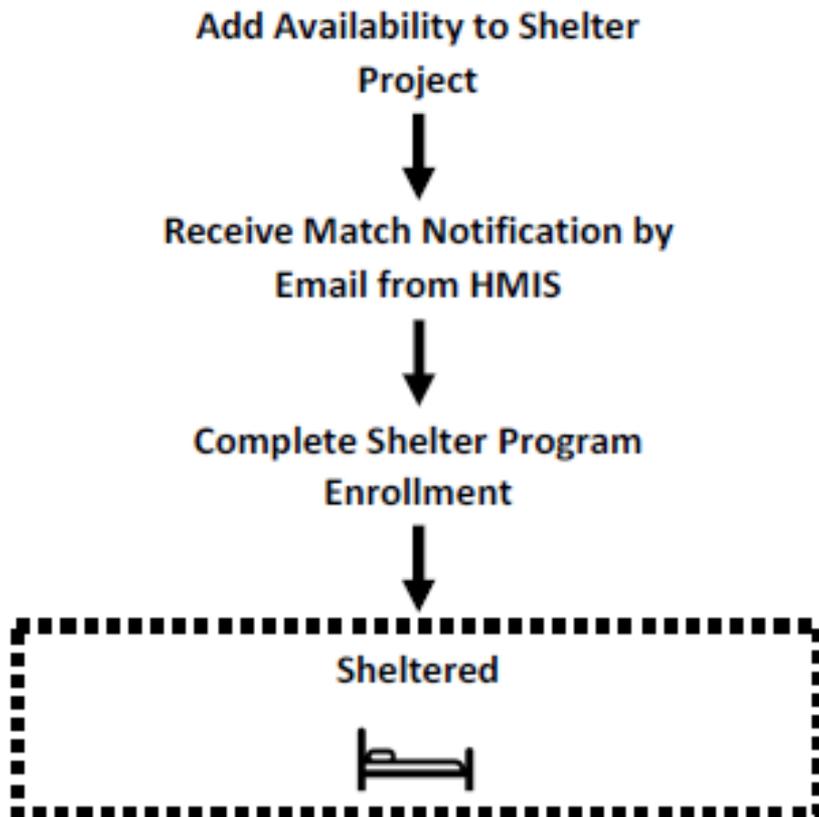
Sincerely,

# Shelter Provider Process





## Shelter Provider



The envisioned workflow for the Shelter Providers will be completing shelter program enrollment for clients to ensure the client is sheltered.

# Step 1: Add Availability to Shelter Project



**Shelter Provider**

DASHBOARD SEARCH CASELOAD REFERRALS

REFERRALS

Pending Community Queue Analysis Completed Denied Sent **Availability**

Program Availability

Bed Reservation Coordinated Entry System

Program Name FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY

There are no available openings

Reserved Openings	Client	Referred Date
Opening		
12/07/2022 ( SPA ) Single Room Occupancy, Non-ADA Room, Site has elevator. Site follows OC Shelter Standards of Care (only 2 bags of personal belongings allowed) Unit 323	Referred by: County of Orange	11/23/2022

ADD SINGLE OPENING ADD MULTIPLE OPENINGS

Please note, projects should not be listed as having “Full Availability” otherwise you will not be able to add or delete beds from that project.

# Step 1: Add Availability to Shelter Project



**ADD AN OPENING** ✕

Date  

Additional Notes

Household must have Child under age 6

City preference

Opportunity is for Family CES

Maximum size of household that can occupy unit

Opportunity is for Individual CES

Housing Opportunity SPA

Opportunity is for Transition Aged Youth (TAY)

Opportunity is for Veteran CES

**SAVE CHANGES** **CANCEL**

# Step 2: Receive Match Notification by Email from HMIS



## Referral Pending Notification on Orange County Clarity System



Orange County Clarity System

To:



Dear \_\_\_\_\_,

The following Referrals have been Pending more than 1 days:

Client	Referral Date	Days Pending
<a href="#">Client HMIS ID</a> Program: Shelter Name		1

Questions? Visit our online wiki: [help.bitfocus.com](http://help.bitfocus.com)

# Receive Match Notification by Email



Shelter Staff will be copied in the match emails that the Matchmaker sends to the Access Point's Care Team.

[Shelter] MATCH: Shelter Name # Client HMIS ID



CoordinatedEntry

To: Access Point Case Manager/ Care Team on HMIS

Cc: Shelter Staff



Flyer



Hello,

The participant below has been matched to shelter at [Shelter Name](#) :

# Client HMIS ID

The participant will have 3 business days to confirm their interest in completing the shelter intake.

CES ACCESS POINT NEXT STEP: Please contact the participant about the shelter match and help them contact [Shelter Staff](#) via phone call at # Shelter Staff number or email at [Shelter Staff email](#) to schedule an intake appointment. If the participant is not interested in this shelter referral, please reply to this email as soon as possible.

SHELTER NEXT STEP: Please contact the participant to schedule an intake screening.

Sincerely,

# Review Pending Referrals



## REFERRALS

**Pending** Community Queue Analysis Completed Denied Sent Availability

### Pending Referrals

Search  Mode

Sort By   Characteristic

Eligible Clients Only

Client	Referral Date	Qualified	Days Pending
<b>Client Name</b> Program: Shelter Name Referred by: County of Orange <input type="button" value="Edit"/>	12/05/2022	Reassigned	9 total 4 pending

Shelter Providers can view all the households are currently waiting for a shelter bed opportunity.

# Step 3: Complete Shelter Program Enrollment: Deny Client



REFERRAL: EDIT

Client	Arthur Read
Referred Program	Shelter Name
Referred Program Opening	12/14/2022 12/14/2022 (North SPA) Single Room Occupancy, Non-ADA Room, Site has elevator. Unit 323
Referred to Agency	County of Orange
Referring Agency	County of Orange
Referred Date	12/14/2022 9:12 AM
Days Pending	0 day(s)
In Process	0 day(s)
Qualified	Reassigned
Referred by Staff	Access Point
Case Manager	Select <span>▼</span>
Last Activity	12/14/2022 <span>CHECK-IN</span>

Status	Denied <span>▼</span>
Send to Community Queue	-- Select -- <span>▼</span>
Denied By Type	<span>-- Select --</span> Yes No
Denied Reason	Select <span>▼</span>
Denial Information	<input type="text"/>
Private	<input type="checkbox"/>

SAVE CHANGES

CANCEL

# Step 3: Complete Shelter Program Enrollment: Assign Case Manager



## REFERRALS

1

Pending Community Queue Completed Denied Sent Availability

## REFERRAL: EDIT

Client	Francine Frensky
Referred Program	Individual Coordinated Entry System
Referred Program Opening	06/08/2022 Jasmin test shelter bed availability
Referred to Agency	County of Orange
Referring Agency	County of Orange
Referred Date	06/08/2022 3:38 PM
Days Pending	70 day(s)
In Process	0 day(s)
Qualified	Reassigned
Referred by Staff	County of Orange
Case Manager	Select
Last Activity	Select County of Orange Shelter Provider
Status	Pending
Private	<input type="checkbox"/>

2

SAVE CHANGES

CANCEL

# Step 3: Complete Shelter Program Enrollment: Accept Client



PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAMS: AVAILABLE

Program Name

Emergency Shelter

Program Description:

Project Homekey provides interim shelter for adult individuals. Services include access to case workers, meals, access to laundry facilities, or support groups. Each client will create an individualized housing goal plan and will work collaboratively with their case manager on their goals weekly.

Active Clients



- 11 % Families
- 89 % Individuals

Occupancy (Today)



- 87 % Checked In
- 0 % Reserved
- 13 % Available

Referrals (90 Days)



- 1 % Referrals Pending
- 70 % Referrals Connecte
- 29 % Referrals Denied



Funding Source

Local or Other Funding Source

Availability

Limited Availability

Service Categories:

✓ No Category

✓ Health Care

✓ Employment

✓ Transportation

✓ Case Management

PROGRAM AVAILABILITY:

Available openings

1

12/14/2022 [318] Single Room Occupancy, Non-ADA Room, Site has elevator. Site follows OC Shelter Standards of Care (only 2 bags of personal belongings allowed)

HOUSING AVAILABILITY:

Households without children

62 Beds in 62 Units

Program Placement a result of Referral provided by County of Orange

1 pending referral(s). Oldest 9 days.

PRINT DIRECTIONS

ENROLL

# Status View: Confirm Program Enrollment



PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

## PROGRAM HISTORY

Program Name	Start Date	End Date	Type	
Shelter Name Emergency Shelter: Entry/Exit Date Shelter Provider Name	11/15/2022	Active	Individual	

Shelter Providers can confirm if a referral was made by the chain icon next to the program enrollment in client's Program history.

# CES and Bed Reservation HMIS Resources



- [Coordinated Entry \(CES\) and Bed Reservation Knowledge Base](#)
- [Adding Households to the Bed Reservation Community Queue \(for Access Points\)](#)
- [Community Queue for Housing Agencies \(for Emergency Shelter Projects\)](#)
- [Coordinated Entry System \(CES\) for Case Managers](#)

# Common Concerns in the Community Queue



# Missing Verification of Homelessness



Households must have Homelessness Verification or Chronically Homeless Verification uploaded in HMIS before being placed onto the community queue.

Francine **1**

PROFILE HISTORY SERVICES PROGRAMS NOTES **FILES** CONTACT LOCATION REFERRALS

CLIENT FILES

---

 Coordinated Entry Documentation:Chronic Homelessness Verification (if available)  
by County of Orange on 14 Oct, 2022, 176.49 KB  
MODIFY FILE | DELETE FILE

---

 Coordinated Entry Documentation:Homelessness Verification: Third Party **2**  
by County of Orange on 14 Oct, 2022, 176.49 KB  
MODIFY FILE | DELETE FILE

---

 Coordinated Entry Documentation:Disability Verification: Verification from Licensed Professional  
by County of Orange on 14 Oct, 2022, 280.97 KB (if available)  
MODIFY FILE | DELETE FILE

Coordinated Entry System Documents and Resources can be found at:  
<https://ceo.ocgov.com/page/ces-partner-documents-and-resources>

# Missing Current Living Situation



PROGRAM: INDIVIDUAL COORDINATED ENTRY SYSTEM

1

Enrollment History Provide Services **Assessments** Notes Files Forms

× Exit

Assessments

LINK FROM ASSESSMENTS

Current Living Situation

START

2

If a “Current Living Situation” was not completed, it will show up as blank on the “Individual Households Waiting for Bed Reservation” report.

A Current Living Situation Assessment is required whenever a CES Assessment is completed.

A printable version of the Current Living Situation Assessment is available on the Orange County HMIS website at:

<http://ochmis.org/coc-esg-2/>

# Prior Living Situation Errors



Due to the importance of the length of homelessness in the CES assessment, it is critical that CES Access Points have a shared understanding and commitment to accurately completing the prior living situation section of the program entry.

## PRIOR LIVING SITUATION

Type of Residence

Length of Stay in Prior Living Situation

Approximate Date Homelessness Started

Number of times on the streets, in ES, or Safe Haven in the past three years

Total number of months homeless on the streets, in ES, or Safe Haven in the past three years

Current Episode of Homelessness

Past 3 Years of Homelessness

The type of residence in the prior living situation must be a literal homelessness location.

Ensure that the participant has the correct date of Approximate Date of Homelessness Started for the **current** episode of Homelessness during the Program Entry

# Missing or Expired “Needs Bed Reservation Assistance”



The "Needs Bed Reservation Assistance" service is required to be included on the bed reservation system community queue and the service needs to be updated on a weekly basis to ensure that clients are active and interested in shelter.

PROGRAM: INDIVIDUAL COORDINATED ENTRY SYSTEM

Enrollment History **Provide Services** Assessments Notes Files Forms

× Exit

## Services

Bed Reservation Wait List

Case Management ▾

Needs Bed Reservation Assistance

Start Date:

10/14/2022



End Date:

10/14/2022



SUBMIT

Please reference the section "Confirm the Household still needs Bed Reservation Assistance" in the [Adding Households to the Bed Reservation Community Queue article](#)

# Care Team Not Updated



PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS SERVICES

SEARCH CASELOAD

PROGRAM: INDIVIDUAL COORDINATED ENTRY SYSTEM

132 DAYS ACTIVE PROGRAM

Program Type: Individual  
Program Start Date: 06/08/2022  
Assigned Staff: County of Orange Training Agency

Enrollment **History** Provide Services Assessments Notes Files Forms X Exit

Household Member  
No active members  
Active Programs  
Individual Coordinated Ent  
Care Team 1

0 DAYS ACTIVE PROGRAM

Program Type: Individual  
Program Start Date: 11/17/2020

CHANGE ASSIGNED STAFF

Make Program Private

Jean Martin, Knowledge an...  
 Anna Hung  
 Anna Volunteer  
 Jean Martin  
 Knowledge and Training Engineer  
 Learning Coordinator

Ensure that the Care Team is up to date

2

3

There have been bounce back emails for matches due to out-of-date Care Team information. Please ensure that the Care Team is updated.

For information about updating the Care Team see:

<http://ochmis.211oc.happyfox.com/kb/article/140-reassigning-case-managers/>

# Missing Contact Information



PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES **CONTACT** LOCATION REFERRALS SERVICES

1

CLIENT CONTACTS

2

ADD CONTACT (+)

## ADD CONTACT

Contact Type	Client
Email	
Phone (#1)	XXX-XXX-XXXX
Phone (#2)	XXX-XXX-XXXX
Active Contact	<input checked="" type="checkbox"/>
Private	<input type="checkbox"/>
Contact Date	__/__/____ 

There have been bounce back emails for matches due to out-of-date Care Team information. Please ensure that the Care Team is updated.

Questions can be sent via email at

[CoordinatedEntry@ocgov.com](mailto:CoordinatedEntry@ocgov.com)

Office of Care Coordination

[CoordinatedEntry@ocgov.com](mailto:CoordinatedEntry@ocgov.com)