C-CAN HMIS Action Guide

1 Search for client and check for ROI

Consent is universal. If a client has already given consent and signed an ROI, do not go through the consent process with them again.

2 Obtain consent if needed

If a client is not in Clarity or is in Clarity and missing an ROI, go through the consent process with them.

3 Obtain contact information

Obtain and enter any and all ways of reaching the client into the Contact tab at the top of the client's profile.

4 Enroll client

From the Programs tab, enroll the client into the Cambridge CAN program and complete the entry questions.

5 Record Current Living Situation Assessment

From the Assessment tab on the program level, record a Current Living Situation Assessment. See below for more guidance on when to record a Current Living Situation Assessment.

6 Record Cambridge Streamlined Assessment

From the Assessment tab on the program level, record a Cambridge Streamlined Assessment.

7 Refer to Community Queue

From the screen after saving the Streamlined Assessment, select Streamlined Queue and click on the "Refer Directly to Community Queue" button. Record any notes about the client's level of engagement and click on "Send Referral".

Return to this notes section to keep track of any and all contacts you've had or attempted to have with the client (in person, by phone or email, etc.). The notes recorded in this section form a timeline of our coordinated history between you and other partner staff that help us track progress, needs, and next steps. While the client's record is active on the queue, document your efforts in this section and show information discussed during case conferencing—anything pertaining to helping the client to become or remain housed. Recording all of this work is important in helping clients and keeping track of due diligence.

NOTE: do **not** put someone back on the Community Queue if they have been removed from it already. If you think there has been an error, contact Erin Bollinger.

When to record a Current Living Situation Assessment

C-CAN assessors will often have to record Current Living Situation Assessments for their clients. Record a CLS when:

- You enroll the client (at project start)
- A Streamlined Assessment is recorded
- The client's living situation changes
- A client's Current Living Situation hasn't been recorded in 90 days

Cambridge CONTINUUM OF CARE