

Shelter Bed Reservation System Training



Agenda



- Bed Reservation System Overview and Updates
- Frequently Asked Questions
- Additional Questions and Feedback
- Bed Reservation Step-By-Step Training for Access Points

Bed Reservation System Overview



- 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.
- The Shelter Bed Reservation System for individual households started accepting households onto the Bed Reservation Community Queue on September 20th, 2022.

Participating Emergency Shelters



- [Alternative Shelter Location \(ASL\)](#)
- [Anaheim North Harbor](#)
- [Bridge Housing Program \(BHP\)](#)
- [Bridges at Kraemer Place \(Bridges\)](#)
- [Huntington Beach Oasis](#)
- [Yale Navigation Center](#)

Prioritization

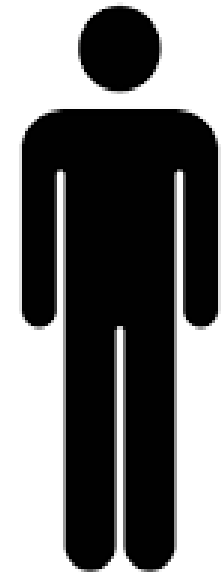


- The Bed Reservation System follows current Coordinated Entry System (CES) Prioritization Policies
- Prioritization will be based on the current CES prioritization of chronic homelessness by length of homelessness, then those who are not chronically homeless by disabling condition, length of homelessness and shelter status.
- To read more about the current Coordinated Entry System Policies and Procedures, you can find the approved Policies at https://ceo.ocgov.com/sites/ceo/files/2022-09/CES%20POLICY%20FINAL_220928_APPROVED.pdf



- For more information on how to refer someone to the Shelter Bed Reservation Community Queue, please review the [Individual Bed Reservation System Information Session PowerPoint](#) on the [Bed Reservation System webpage](#) that includes an overview of the Individual Shelter Bed Reservation System, as well as the step-by-step process of the HMIS steps.
- For additional resources, 211OC has a [Knowledge Base](#) with articles on how to [Add Households to the Bed Reservation Community Queue](#), as well as a [Bed Reservation Overview](#).
- [Frequently Asked Questions](#)

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

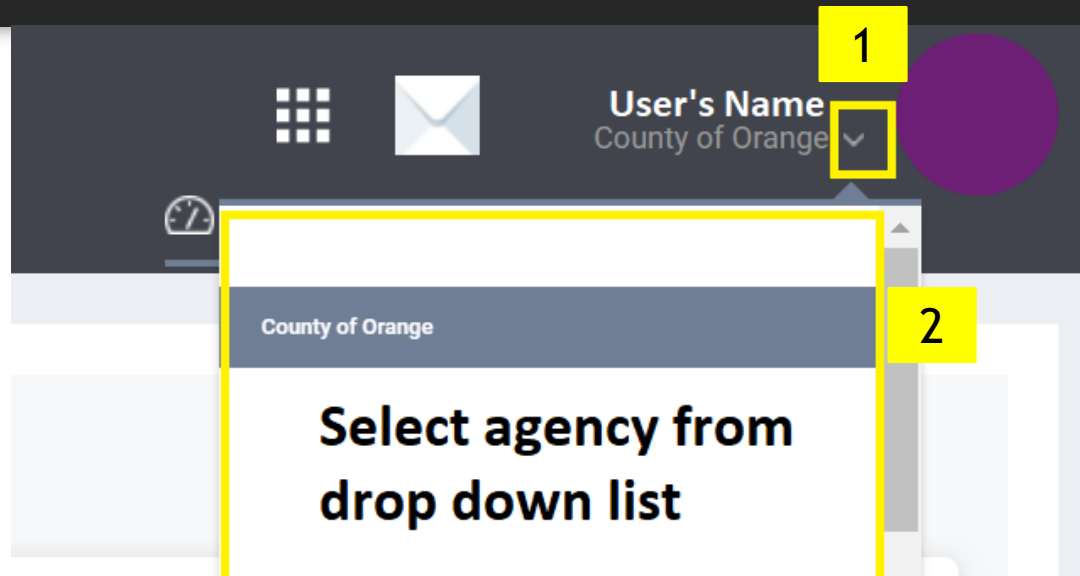


Enter Needs Bed Reservation
Assistance Weekly

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 right, the text "User's Name" and "County of Orange" is displayed next to a purple circular profile picture. A yellow box labeled "1" highlights the dropdown arrow next to "County of Orange". Below this, a dropdown menu is open, showing "County of Orange" as the selected item. A yellow box labeled "2" highlights the dropdown menu. A text box with the instruction "Select agency from drop down list" is overlaid on the dropdown menu.

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 Adult. Age: 34
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

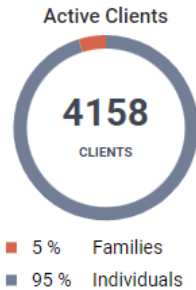


1

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

PROGRAMS: AVAILABLE

Individual Coordinated Entry System



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

3

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

✕ 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 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 for managing a referral. The top navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a yellow box and a '1' callout), NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a blue bar indicates the current program: PROGRAM: INDIVIDUAL COORDINATED ENTRY SYSTEM. A secondary navigation bar includes Enrollment, History, Provide Services (highlighted with a yellow box and a '2' callout), 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' entry with a 'Start Date' of 12/14/2022 and an 'End Date' of 12/14/2022, both dates accompanied by calendar icons. A 'SUBMIT' button (highlighted with a yellow box and a '3' callout) is located at the bottom right of the entry.

Keeping the participant active



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

If the referral is not updated on a weekly basis, it will expire. Participants that have not had any activity in HMIS in the previous seven (7) days will automatically be removed from the Shelter Bed Reservation Community Queue. The referral expires at approximately 3 a.m. on the 7th day of no activity in HMIS.

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

"Needs Bed Reservation Assistance" service



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



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

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

Services

Bed Reservation Wait List Case Management ▾

Needs Bed Reservation Assistance ^

Start Date: 03/19/2023  End Date: 03/19/2023 

SUBMIT

"Needs Bed Reservation Assistance" service



There are reports available in HMIS that can be run to confirm who is on the Shelter 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 interface. The top navigation bar includes "REPORT LIBRARY", "EXPLORE", and "DATA ANALYSIS". A dropdown menu for "DATA ANALYSIS" is open, showing "REPORTS" and "CALENDAR". The "Built In Reports" section lists "Orange County Clarity System Reports" with 139 report(s). Below this, a detailed view of the "Orange County Clarity System Reports" is shown, listing several reports with "RUN" buttons. The "Individual Data Entry: Needs Bed Reservation Assistance Service" report is highlighted with a yellow box.

Report Name	Report Count	Action
Built In Reports	3 report(s)	
Orange County Clarity System Reports	139 report(s)	
Orange County Clarity System Reports	152 report(s)	
Bed Reservation		
Individual Bed Reservation Available Housing Opportunities		RUN
Individual Data Entry: Needs Bed Reservation Assistance Service		RUN
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 must 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.

2/11 | 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

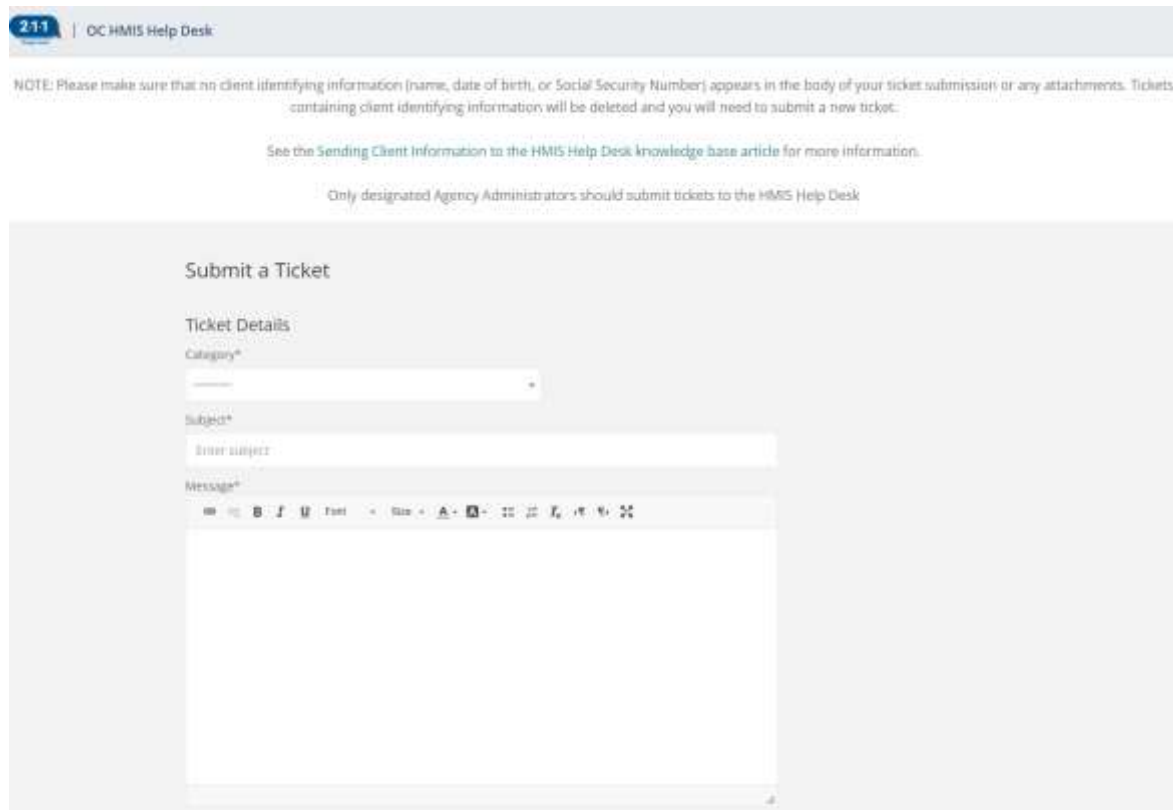
Category*

Subject*

Enter subject

Message*

Font Size



Matching Process: Match Email



If a participant is matched to a shelter opportunity, HMIS will automatically send an email to the HMIS Agency Administrator at the referring Shelter. The Matchmaker will also send an email to the Shelter Provider and Access Point Care Team notifying them of the match that was made and the next steps.

[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,

Matching Process: Contact Information



The screenshot displays the OCHMIS system interface. At the top, a navigation bar includes links for PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, REFERRALS, and SERVICES. A search bar and CASELOAD icon are on the right. The main content area shows a program summary for '132 DAYS ACTIVE PROGRAM' with details: Program Type: Individual, Program Start Date: 06/08/2022, and Assigned Staff: County of Orange Training Agency. A yellow box with the number '1' highlights the 'PROGRAMS' menu item. Below the summary, a 'CHANGE ASSIGNED STAFF' dropdown menu is open, showing a list of staff members with checkboxes: Anna Hung, Anna Volunteer, Jean Martin (selected), Knowledge and Training Engineer (checked), and Learning Coordinator (checked). A yellow box with the number '2' highlights the dropdown menu. A third yellow box with the number '3' highlights the 'Jean Martin' option in the dropdown. On the left side of the interface, there is a 'Household Member' section with a cartoon image of a woman and a 'Care Team' section with a red warning message: 'Ensure that the Care Team is up to date'. A yellow box with the number '1' also highlights the 'PROGRAMS' menu item.

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/>

Questions?

Office of Care Coordination

CoordinatedEntry@ocgov.com