



# HUD's Centralized Intake and Coordinated Assessment: What Does This All Really Mean for SOAR Providers?

**Please stay on the line.  
The webinar will begin shortly.**

**AUDIO:**

Toll Free Number: [1-888-323-4910](tel:1-888-323-4910)

Passcode: [4510737](tel:4510737)

Contact [ssodergren@prainc.com](mailto:ssodergren@prainc.com) if you experience technical difficulties



# HUD's Centralized Intake and Coordinated Assessment: What Does This All Really Mean for SOAR Providers?

---

**PRESENTED BY:**

SAMHSA SOAR TECHNICAL ASSISTANCE CENTER  
POLICY RESEARCH ASSOCIATES, INC.

**UNDER CONTRACT TO:**

SUBSTANCE ABUSE AND MENTAL HEALTH SERVICES ADMINISTRATION  
U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES

# Welcome!

---

**KRISTIN LUPFER, PROJECT DIRECTOR**  
SAMHSA SOAR TECHNICAL ASSISTANCE CENTER  
POLICY RESEARCH ASSOCIATES, INC.

# Webinar Instructions

---

- Muting
- Recording availability
- Downloading documents
- Evaluation
- Question instructions

# Agenda

---

## **Brief Overview of HUD's Coordinated Entry/Intake/Assessment System**

- *Pam Heine, Senior Project Associate, SOAR TA Center, Delmar, NY*

## **How's Nashville: Coordinated Entry Development in Nashville**

- *Will Connelly, Director, Metropolitan Homelessness Commission, Nashville, TN*

## **Texas Coordinated Entry and SOAR**

- *Kris Linenberger, Program Development Specialist and SOAR State Team Lead at Texas Homeless Network (THN), Austin, TX*

## **Tarrant County Coordinated Entry Model: Where SOAR Fits**

- *Cindy Crain, Director, Tarrant County Homeless Coalition, Fort Worth, TX*

## **Questions and Answers, SOAR Technical Assistance Center**

# Purpose

---

- Provide an introduction to HUD's Coordinated Entry/Access/Intake System
- Describe how two states are meeting HUD's requirements by sharing planning efforts to date
- Explain how SOAR providers fit into the new system
- Show how SOAR applicants are entering the homeless services system to access most appropriate services for their unique needs
- Overall take away- Look at this systems level change from a SOAR perspective!

# Introduction to HUD's Coordinated Assessment System

---

*Coordinated assessment, also known as coordinated entry or coordinated intake, is a new requirement for all HUD Continuums of Care (CoCs) as established by the HEARTH Act. It paves the way for more efficient homeless assistance systems by:*

- *Helping people move through the system faster (by reducing the amount of time people spend moving from program to program before finding the right match);*
- *Reducing new entries into homelessness (by consistently offering prevention and diversion resources upfront, reducing the number of people entering the system unnecessarily); and*
- *Improving data collection and quality and providing accurate information on what kind of assistance consumers need.*

**GOAL: Ending Homelessness!**

# Poll Question #1

---

**What is your level of familiarity with HUD's Coordinated Entry (put into SSA terms we can all understand!)**

**None-** I have never heard about HUDs Coordinated Entry (CE)

**Mild-** I have heard about CE, but not sure how it's being developed in my state or CoC

**Moderate-** I have heard about CE and know somewhat about how SOAR fits in

**Extreme-** I participate in our CE Workgroup with developing and planning how people with disabilities enter the system and receive appropriate services



# HOW'S NASHVILLE- Coordinated Entry PLANNING AND DEVELOPMENT

---

WILL CONNELLY, METROPOLITAN HOMELESSNESS COMMISSION,  
NASHVILLE, TN

# HOW'S NASHVILLE

Coordinated Entry  
System  
Development in  
Nashville



# COORDINATED ASSESSMENT IS TOUGH



# WALK FIRST, THEN FORMALIZE



NASHVILLE

Source	June	July	Aug
Donated Units	18	23	21
Section 8	0	18	18
VASH	10	17	23
Non-profits	15	18	19
	43	76	81

200

# HOW'S NASHVILLE: WE GET MORE DONE TOGETHER



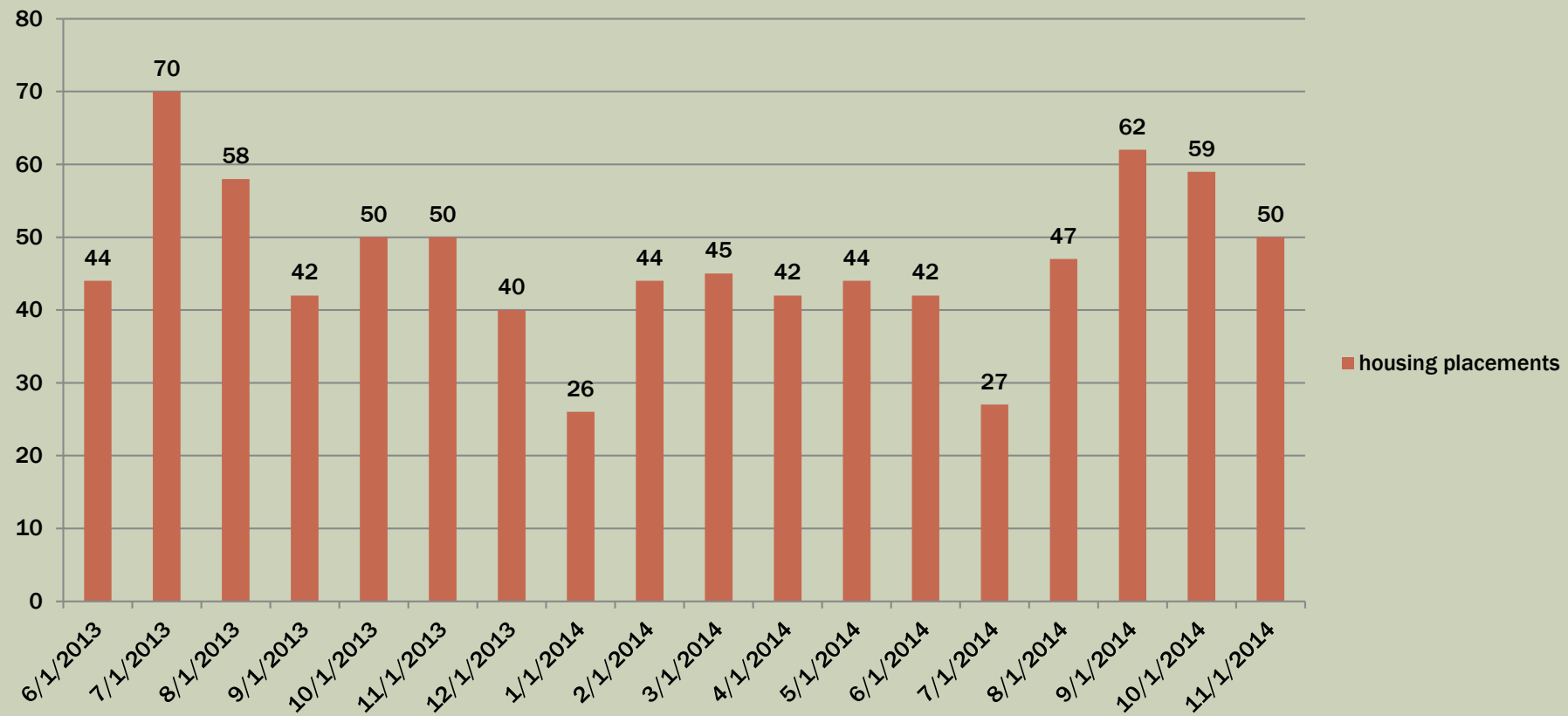
# 3 GOALS OF HOW'S NASHVILLE CAMPAIGN

1. Increase housing placement rate to 2.5% of PIT
2. Maintain housing retention rate of 75% after 1 year
3. Decrease time from streets to lease
  - Improve data sharing by any (legal) means necessary
  - VI-SPDAT data used to prioritize permanent housing resources
  - Coordinated Entry skunkworks – testing for radical innovation



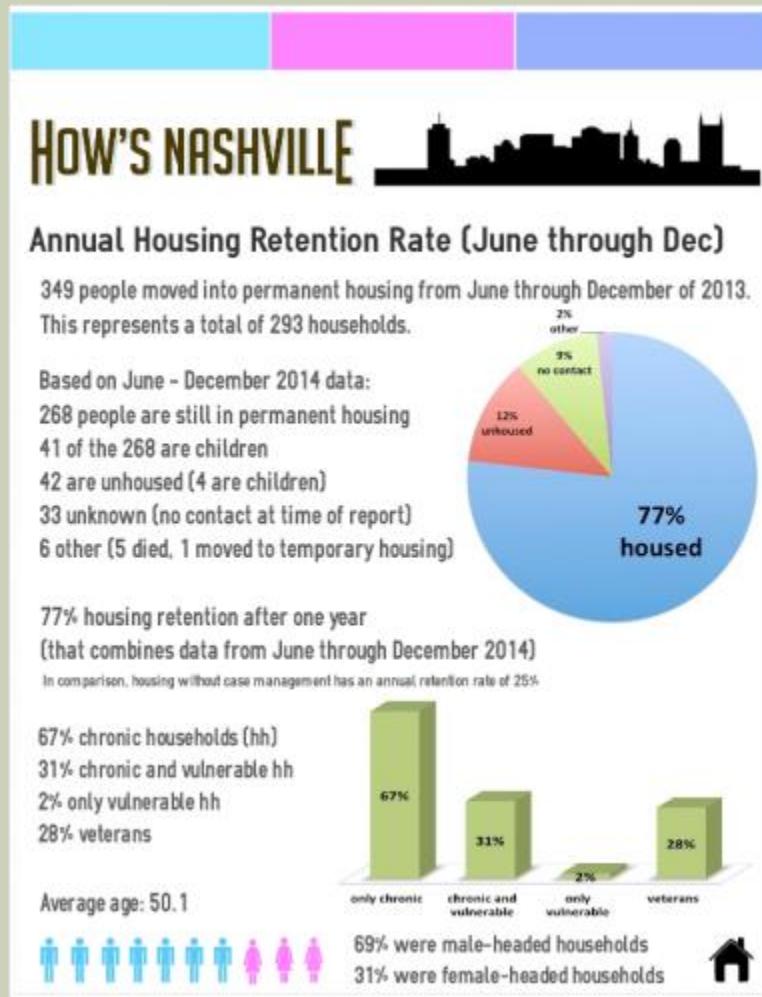
# 1. INCREASE HOUSING PLACEMENT RATE

## Community Housing Placements





## 2. CLEAR, MEASUREABLE OUTCOMES: HOUSING RETENTION



- Success = stable in housing after 1 year
- 349 people were housed June-Dec 2013
- 77% success rate
- Retention data is reported by partners

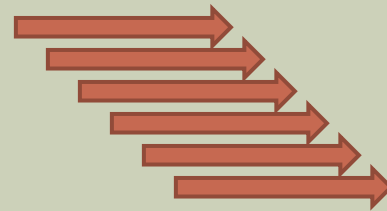


# 3. DECREASE TIME TO HOUSING (COORDINATED ENTRY)

VI-SPDAT



VI-SPDAT



“Preferred” Section 8 vouchers

SRO Housing

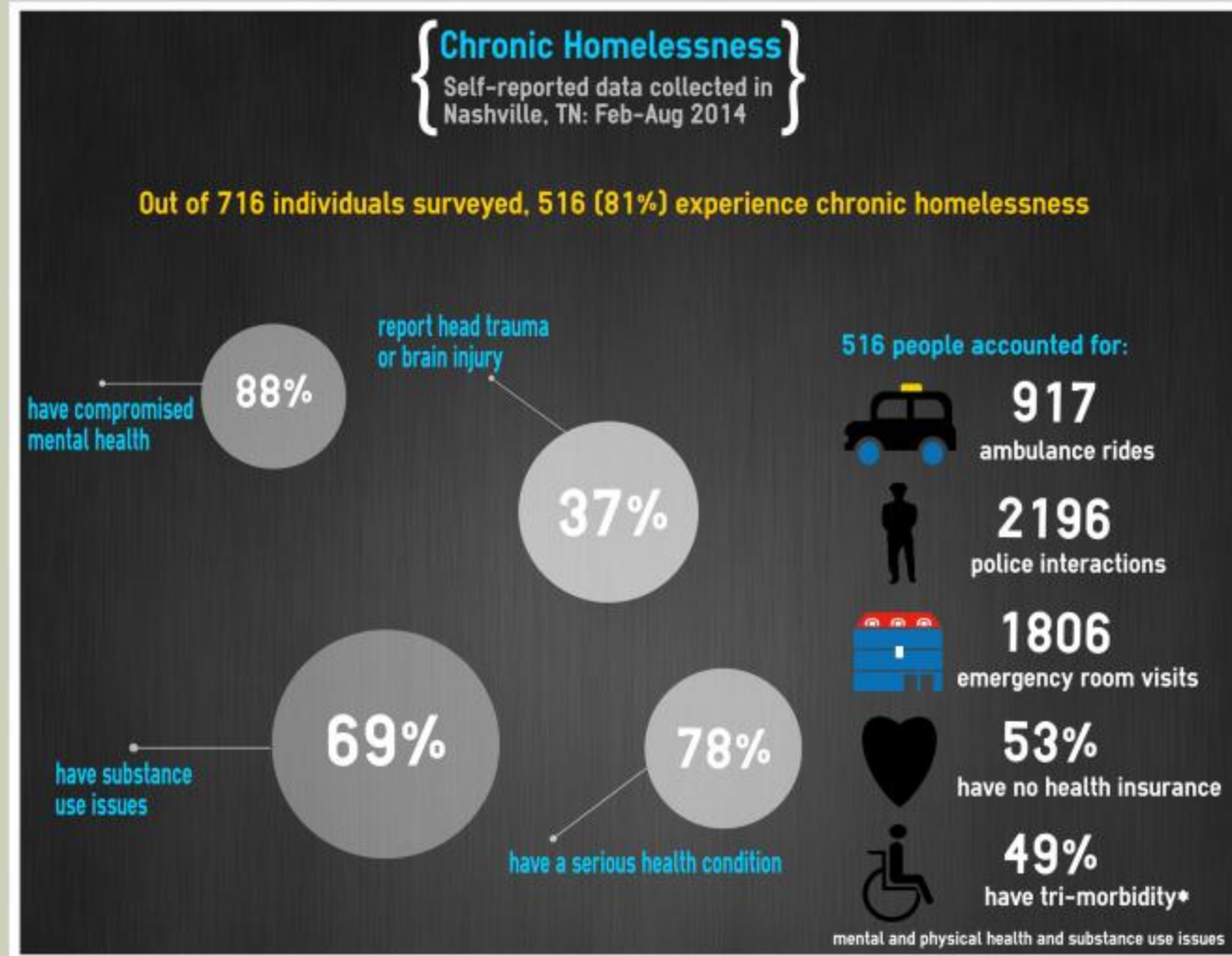
SHP Housing

Private Landlords

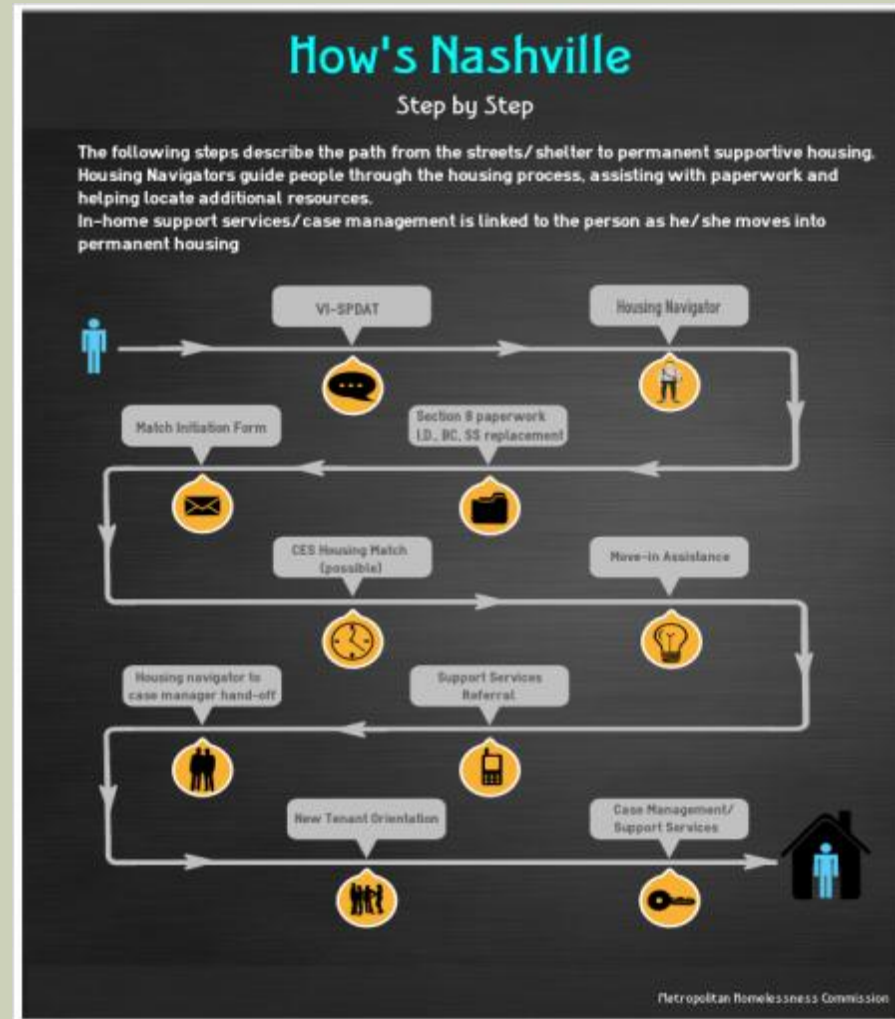
Flexible funds for move-in costs

Support Services\*

# VI-SPDAT: USING A COMMON ASSESSMENT TOOL



# PROCESS MAPPING: FROM STREETS TO HOUSING



# CURRENT CES DATA COLLECTION

- One giant, fancy Google spreadsheet
- We almost broke Google
- Now transitioning to new database that will communicate with HMIS

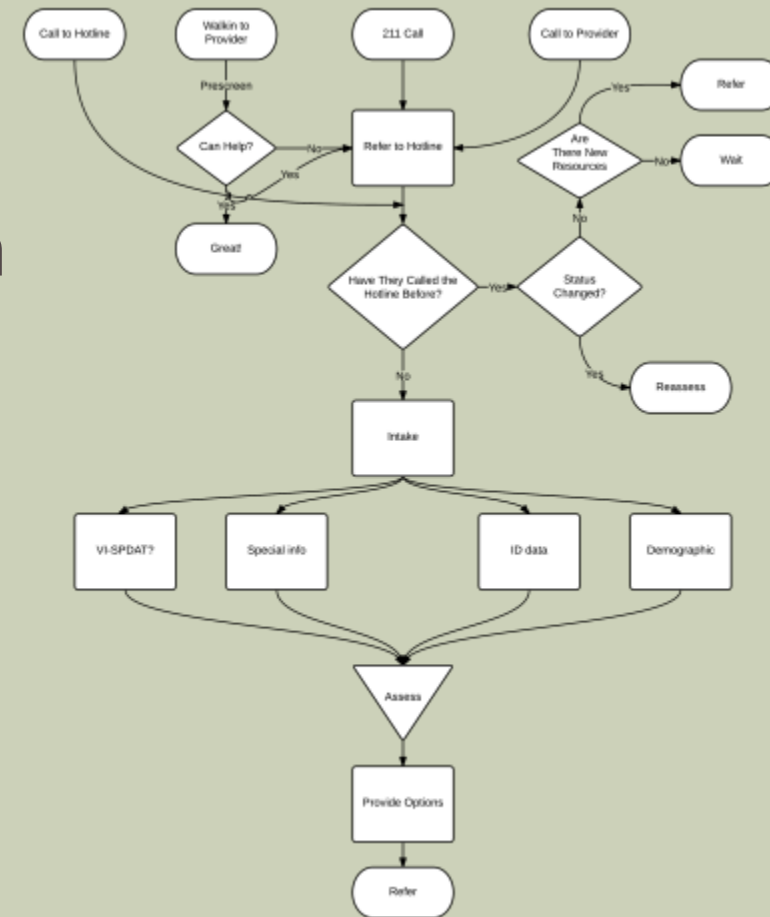
# GUIDING PRINCIPLES OF CES IMPROVEMENT IN NASHVILLE

- Data is key (HMIS as data hub)
- Person-Focused (do no harm)
- Housing-Focused (housing is the only cure to homelessness)
- Simplified Access (no more “maze”)
- Serve “the hardest to serve” (prioritization based on need)

# JULY 1, 2015: SWITCH-ON DATE

## CES Components

- Hotline for prevention/diversion
- In-person assessment locations
- Outreach to camps/streets
- Referrals to housing and services



# THE AMAZING AMERICORPS/VISTAS



## NEXT STEPS

- Weekly implementation team meetings to meet 7/1 launch
- Gathering eligibility criteria for housing/services including SOAR
- Developing policies, procedures, and governance for new system
- Buy-in for new system; COW



**WILL CONNELLY**  
**WILL.CONNELLY@NASHVILLE.GOV**  
**615-727-2225**

Will Connelly  
Director  
Metro  
Homelessness  
Commission



# Quiz Time! Test Your Understanding

---

## TRUE or FALSE

“How’s Nashville” is a non-profit which has been solely responsible for setting Nashville’s goal and is accountable only to Anderson Cooper.

## Quiz Time! Test Your Understanding

---

**FALSE!**

*How's Nashville* is not a nonprofit, rather; a group of providers setting goals together and holding each other accountable

# TEXAS COORDINATED ENTRY AND SOAR

---

KRIS LINENBERGER, TEXAS HOMELESS NETWORK (THN) AND SOAR  
STATE LEAD, AUSTIN, TX

# Texas SOAR and Coordinated Access

Kris Linenberger, MSW

# Texas Homeless Network

Texas Homeless Network (THN) is a non-profit membership-based organization that provides solutions to ending homelessness in Texas communities through education, resources and advocacy.

Visit [thn.org](https://thn.org) for more information

## THN's Training

Texas Homeless Network (THN) provides training and technical assistance around the state.

### Upcoming State-wide Trainings:

- Healthcare + Housing Summit, March 31 – April 2, Austin
- Case Management Institute, May 20 – 21, Austin
- Texas Conference on Ending Homelessness, presented by Texas Homeless Network, Region 10 Education Service Center, and Texas Homeless Education Office, September 30 – October 2, Corpus Christi
- Regional SOAR Trainings, Spring 2015







## SOAR meets 2013

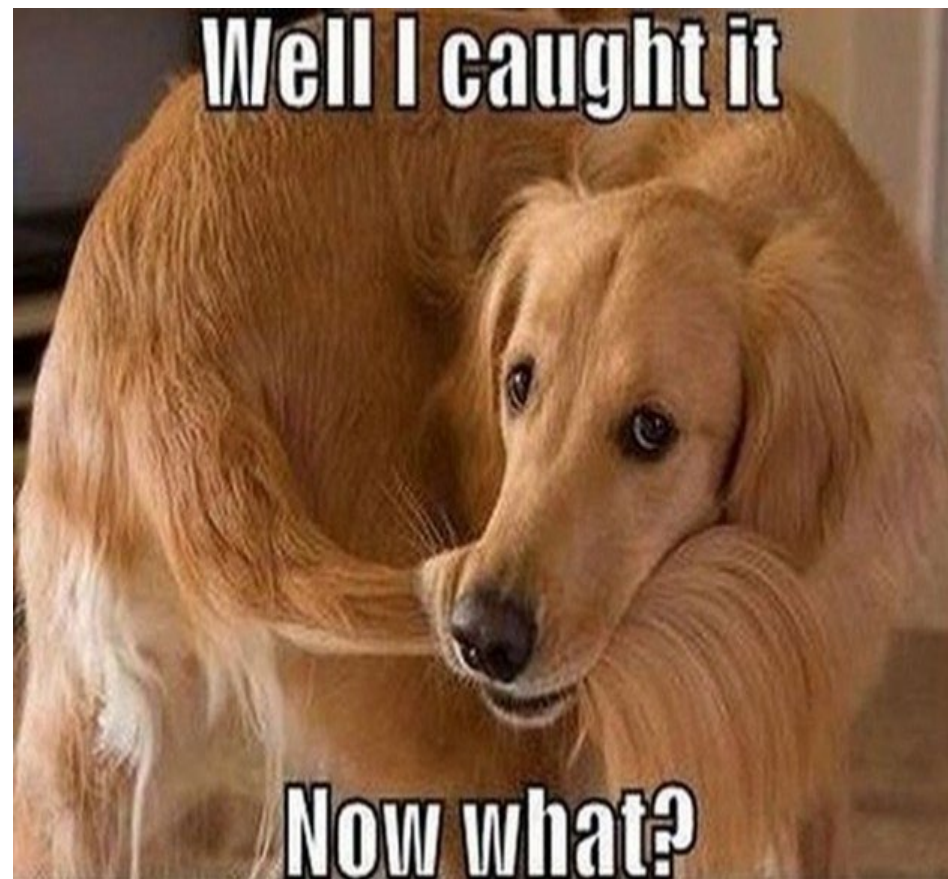
- Texas has been training communities in the SOAR model since 2008
- The current model was not sustainable
- We needed embedded community support
- During this time the Texas SOAR program underwent substantial changes including...

# Texas SOAR changes

- Three Phase Implementation to ensure a community driven model has each CoC taking ownership of:
  1. SOAR Planning  
by holding strategic planning meetings
  2. SOAR Training  
by actively planning trainings
  3. SOAR Follow-up  
by implementing SOAR leads and steering committees

## Realizations

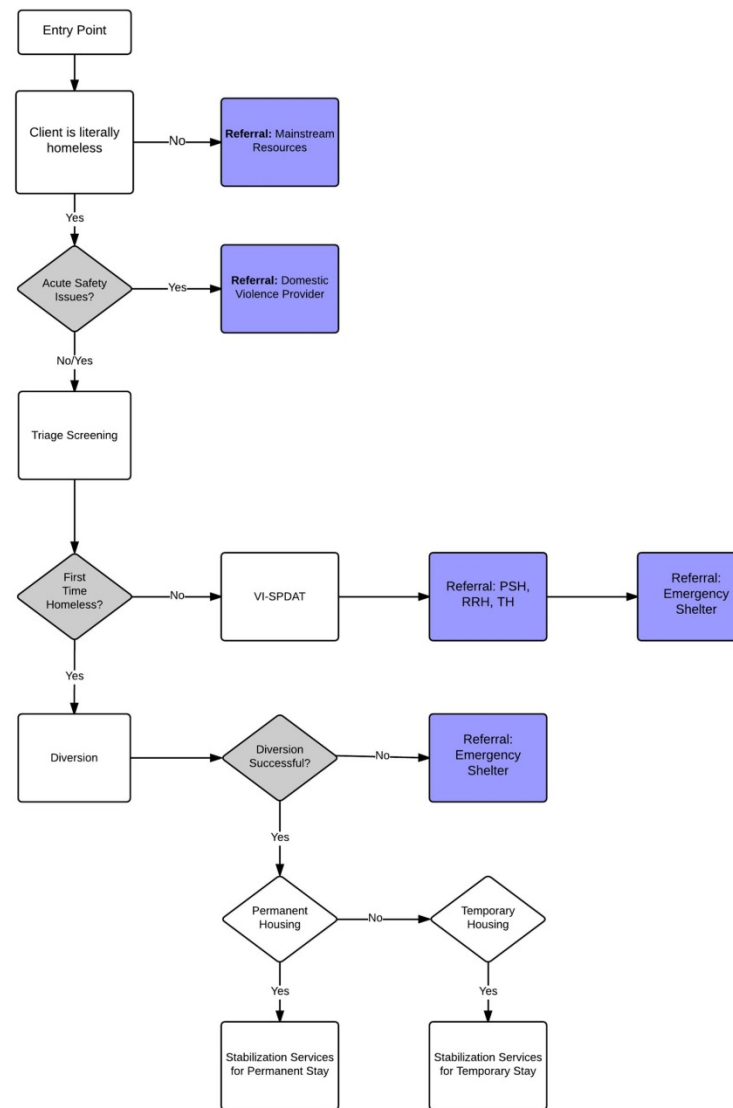
- How integral Coordinated Access will need to be to all CoCs
- Within this system we must implement components so that SOAR is an “easy on” for Coordinated Access within Texas CoC areas
- ...HOW DO WE DO THIS?



# What approach?

Key:

- White=Screening or Intervention
- Grey=Decision
- Purple=Referral



## ...meet Tarrant County

- Tarrant County (Fort Worth, Arlington, Grapevine, Keller, Flower Mound,)
- Executive Director, Cindy Crain
- They have implemented a robust Coordinated Access system to meet the community needs while collecting outcomes...awesome!



# Coordinated Entry: Tarrant County Model

---

CINDY CRAIN, TARRANT COUNTY HOMELESS COALITION,  
FORT WORTH, TEXAS

# SOAR NETWORK

---

## Implementation within a CoC

Cindy J. Crain, Executive Director  
[cjcrain@AHomeWithHope.org](mailto:cjcrain@AHomeWithHope.org)

Rebecca Cox, Deputy Director  
[Rebecca@AHomeWithHope.org](mailto:Rebecca@AHomeWithHope.org)

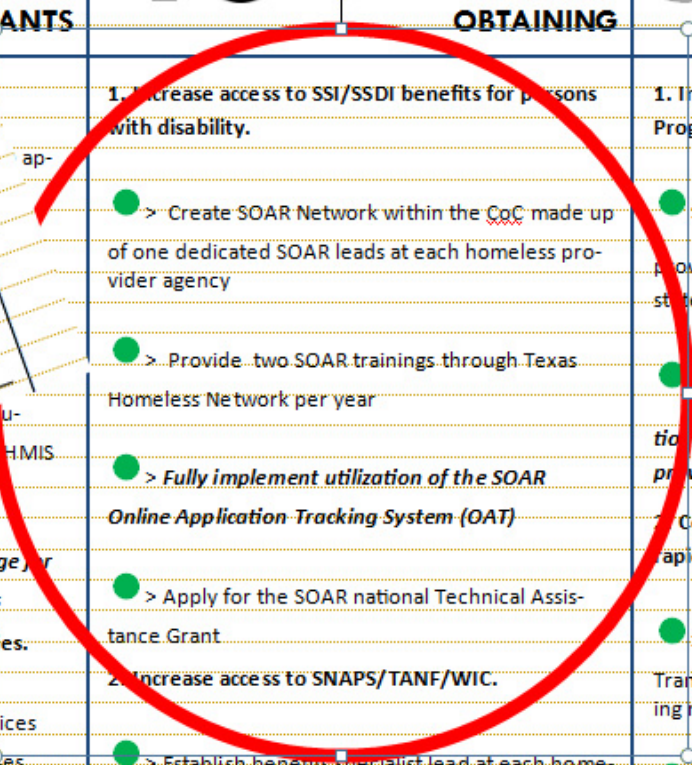




# Make SOAR a CoC Priority

1	2	3	4	5
<p><b>Objective</b></p> <p><b>INCREASE HOUSING STABILITY</b></p> <p>Icon: Key</p>	<p><b>Objective</b></p> <p><b>INCREASE INCOMES OF PARTICIPANTS</b></p> <p>Icon: Clipboard</p>	<p><b>Objective</b></p> <p><b>INCREASE PARTICIPANTS OBTAINING</b></p> <p>Icon: Dollar Sign</p>	<p><b>Objective</b></p> <p><b>RAPID REHOUSING</b></p> <p>Icon: Family</p>	
<p>1. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>2. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>3. Increase the number of persons that exit PSH programs into permanent housing.</p>	<p>1. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>2. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>3. Increase the number of persons that exit PSH programs into permanent housing.</p>	<p>1. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>2. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>3. Increase the number of persons that exit PSH programs into permanent housing.</p>	<p>1. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>2. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>3. Increase the number of persons that exit PSH programs into permanent housing.</p>	<p>1. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>2. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>3. Increase the number of persons that exit PSH programs into permanent housing.</p>
<p>1. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>2. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>3. Increase the number of persons that exit PSH programs into permanent housing.</p>	<p>1. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>2. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>3. Increase the number of persons that exit PSH programs into permanent housing.</p>	<p>1. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>2. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>3. Increase the number of persons that exit PSH programs into permanent housing.</p>	<p>1. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>2. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>3. Increase the number of persons that exit PSH programs into permanent housing.</p>	<p>1. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>2. Increase the number of persons that exit PSH programs into permanent housing.</p> <p>3. Increase the number of persons that exit PSH programs into permanent housing.</p>

December 10, 2014 QPR  
**2014-2015**  
**Continuum of Care**  
**Strategic Plan**





# Making SOAR a CoC Priority

- Applied for the SOAR Technical Assistance Grant
- SOAR Forum August 2014 and sent two CoC folks to SOAR Leadership Academy
- Created a more detailed local SOAR process implementation plan
- Monthly SOAR meetings began in October
  - Staff any tough cases



# CoC SOAR Workgroups

## MEDICAL WORKGROUP

- Streamline access to medical records
- Locate SOAR contact person at hospitals
  - Educate on what SOAR is
- Determine current process for medical, psychiatric, hospitalizations
  - Report to all SOAR providers
- Identify challenges and solutions to record retrieval
- Locate MD available for MSR signature monthly or as needed
  - Educate on what SOAR is
  - Determine process for MSR review with MD



# CoC SOAR Workgroups

## CORRECTIONS WORKGROUP

- Streamline access to records
- Locate medical contact at jails
  - Educate on what SOAR is
  - Locate corrections facility staff to be SOAR trained
  - Facilitate training
- Contact THN to get SOAR trained list from prison systems across Texas
- Contact TC Corrections to get other names of prison contacts
- Collaborate with Tarrant ReEntry Coalition



# CoC SOAR Workgroups

## OUTCOMES AND TRACKING WORKGROUP

- Review OAT and SOAR forms
- Examine OAT and HMIS common data (critical documents)
- Register all for OAT
- Determine ways to get all providers on board with reporting outcomes



# Reinforcing SOAR as a CoC Priority

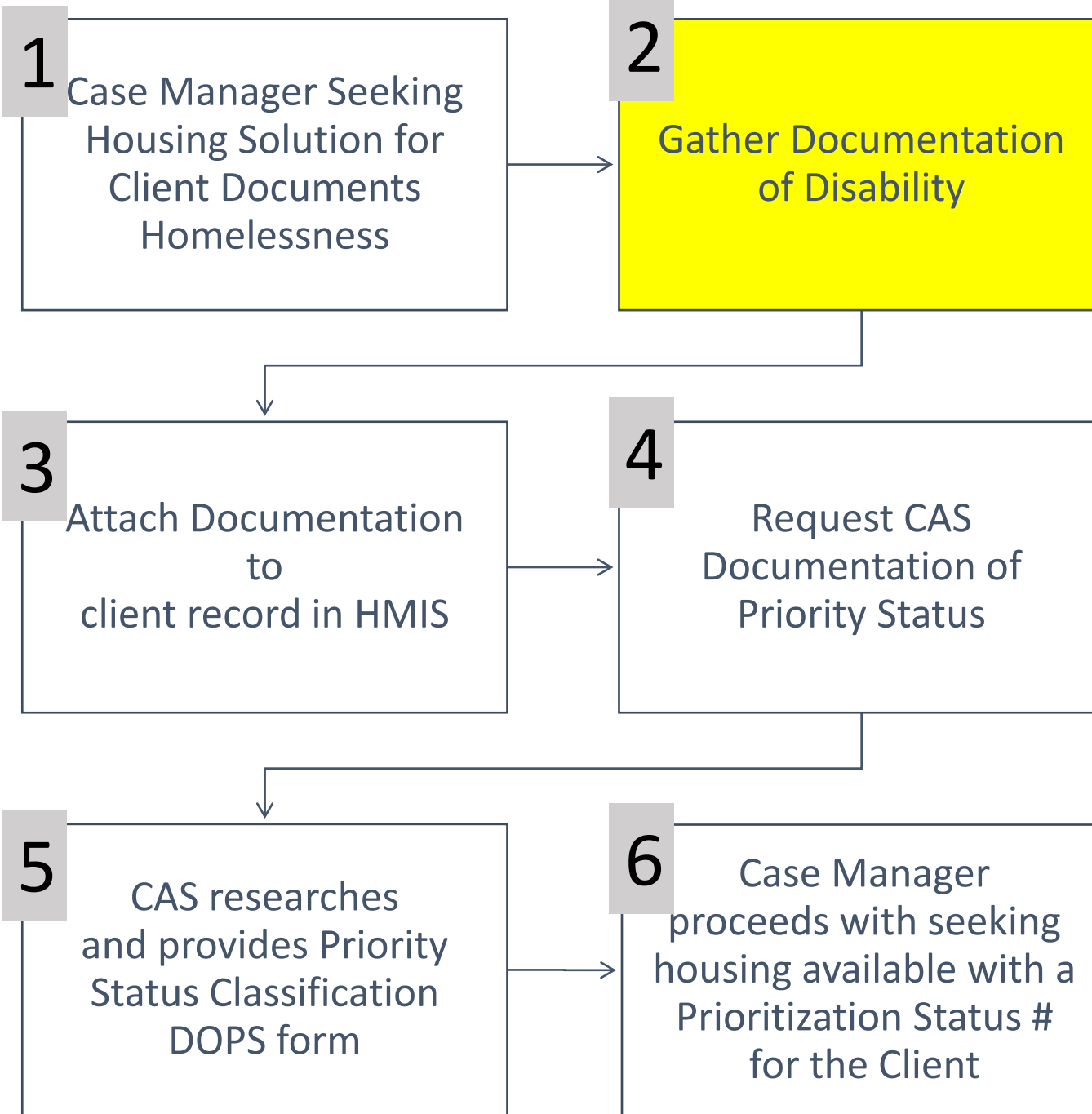
- 2014: SOAR Training is a CoC Participation Scoring Item
- 2014: Identified SOAR Lead within an Agency is a CoC Participation Scoring Item
- 2015: SOAR Success / Performance reporting will be a CoC Scoring Item



# Commonality in SOAR and Coordinated Assessment

- Documentation of disability





# Documentation of Priority Status

HUD CPD NOTICE  
ON PRIORITIZATION

## **P12 system**

P1-4 – *Chronic* Homeless Dedicated PSH Beds

P5-8 – Non Dedicated to *Chronic* PSH Beds (85% policy)

P9 – TH Beds for families with high level of service needs

P10 – TH Beds for individuals with high level of service needs

P11 – RRH Beds for families with low level of service needs

P12 – RRH Beds for individuals with low level of service needs



# Documentation of Priority Status

When disability documentation is submitted – CAS specialists check:

Is there disability income?

- Yes, make sure income is recorded in HMIS
- No, Process and flag for potential SOAR application: Case Manager submitting the DOPS request is notified to contact their Agency SOAR Contact and cc:ed to the SOAR Lead at MHMR

# SOAR Collaborations Growing

- Tarrant County Hospital District – JPS Health Network 1115 Waiver Program ‘Care Connections for the Homeless’
  - WALK UP CLINIC: Understand the critical role of medical diagnosis and documentation and collaborating with case managers at shelters
  - NEW MEDICAL STREET OUTREACH: PA, RN and Community Health Workers understand the critical role of medical diagnosis and collaboration with outreach, shelter case managers
  
- Health Community Collaborative – MHMR Tarrant County
  - Lead in role in securing and guiding successful high quality applications



## Poll Question #2

---

Cindy described that when disability documentation is submitted, the CAS specialists then checks to find out if there is any disability income. If the answer is NO, what happens next? Choose best answer:

A- Direct client to their local SSA office

B- Process and flag for potential SOAR application: Case Manager submitting the DOPS request is notified to contact their Agency SOAR Contact and cc:ed to the SOAR Lead at MHMR

C- Process and CAS specialist will make random phone call inquiries to find out which agencies have SOAR trained case managers

# Poll Question #2

---

## Answer is “B”

Process and flag for potential SOAR application: Case Manager submitting the DOPS request is notified to contact their Agency SOAR Contact and cc:ed to the SOAR Lead at MHMR

# Resources

---

## CSH Toolkit

<http://www.csh.org/resources/improving-community-wide-targeting-of-supportive-housing-to-end-chronic-homelessness-the-promise-of-coordinated-assessment/>

## Building Changes Toolkit

<http://www.buildingchanges.org/coordinated-entry-toolkit/planning/coordinated-entry-models>

## National Alliance to Ending Homelessness (NAEH) Article

<http://www.endhomelessness.org/blog/entry/field-notes-the-new-comprehensive-assessment-tool#.VMZWX3B4pPk>

## Articles About Community Providers and Collaboration throughout CE process:

<http://charmeck.org/city/charlotte/nbs/housing/housingcoalition/Pages/CoordinatedAssessment.aspx>

[http://www.csh.org/wp-content/uploads/2015/01/TargetingSHthoroughCA\\_Jan15.pdf](http://www.csh.org/wp-content/uploads/2015/01/TargetingSHthoroughCA_Jan15.pdf)

## Link To HUDs Coordinated Assessment Resources

<https://www.hudexchange.info/coc/>

# For More Information on SOAR

---

Visit our website: <http://soarworks.prainc.com>

SAMHSA SOAR TA Center  
345 Delaware Avenue  
Delmar, New York 12054  
(518) 439 – 7415

[soar@prainc.com](mailto:soar@prainc.com)

 [www.facebook.com/soarworks](http://www.facebook.com/soarworks) 

 @SOARWorks 

# Questions and Answers

---

**Facilitated By:**

*SAMHSA SOAR Technical Assistance Center*

*Policy Research Associates, Inc.*