

Racine City and County CoC Coordinated Entry HMIS Guide

Institute for Community Alliances

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INTRODUCTION

This guide is intended to compliment the Racine City and County CoC Coordinated Entry Policies and Procedures. It is the companion document for clients who will be entered into the Coordinated Entry System via HMIS. Additional information about the Racine City and County CoC Coordinated Entry Process can be found here:

<https://racinecoc.org/>

COORDINATED ENTRY DATA ENTRY FOR ALL USERS

Anyone with an HMIS user license can add an individual or household to the priority lists. Any client contacting a Coordinated Entry participating agency requesting housing or shelter related services is required to be offered access to Coordinated Entry. The client may choose to have their data entered into HMIS to be referred to the Coordinated Entry lists utilizing HMIS.

Requirements for Coordinated Entry in HMIS:

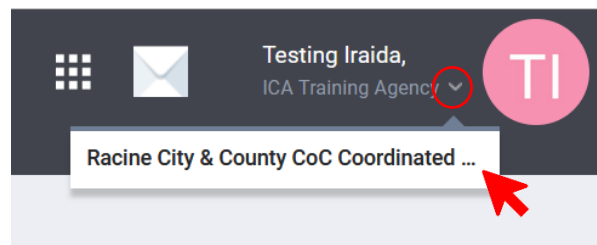
1. The client's consent for themselves and/or their household to participate in Coordinated Entry.
2. A completed Coordinated Entry Prescreen form.
3. A signed HMIS Release of Information form for those being added to the HMIS Priority List.

ADDING AN INDIVIDUAL OR HOUSEHOLD TO THE COORDINATED ENTRY SYSTEM

Getting Started

- Log into Clarity Human Services.
- To complete Coordinated Entry-related data entry, you will need to switch into the "Racine City and County CoC Coordinated Entry System" agency.

In the upper right corner of your screen, you will see your name and your primary agency listed below. Click on the arrow to the right of your primary agency and click on "Racine City and County CoC Coordinated Entry System" from the dropdown to switch into the agency.



- Be sure to switch into the “Racine City and County CoC Coordinated Entry System” agency whenever you are doing Coordinated Entry data entry (enrollments, updates, program exits, etc.)

NOTE: Only users who have completed all Racine City and County CoC Coordinated Entry training requirements can have access to the Racine City and County CoC Coordinated Entry System agency in Clarity Human Services.

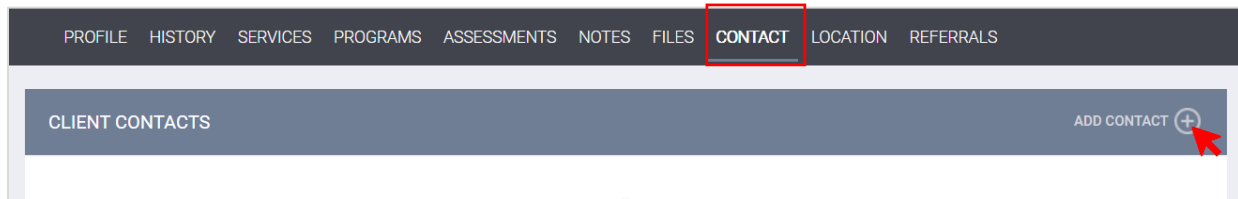
Search for Client(s) in the Household

- Use the Client Search to see if the client(s) being referred to the Coordinated Entry system have an existing file in Clarity Human Services.
 - Create new files for any client(s) that do not have an existing file in the system or confirm accuracy of existing files in the system.
- If you are referring a household with more than one person, make sure all clients are grouped together as a household.

Detailed instructions for both steps above can be found in ICA’s [Basic User Guide](#).

Add Client Contact Information

- Go to the Head of Household’s file and navigate to the **Contact** tab. Click **Add Contact** if there is no contact information documented in the file.



- Fill in all contact information available for the client. If multiple phone numbers are documented, you may use the Note box to provide details for both numbers listed. Once complete click **Save Changes**.

ADD CONTACT

Contact Type

Client

Email

test.test@gmail.com

Phone (#1)

123-456-7899

Phone (#2)

223-445-6677

Active Contact

☒

Private

☐

Contact Date

04/01/2021

Note

B I 1 2 3 4 5 6 7 8 9 0

Phone #1: Client's primary phone number

Phone #2: Client's mother, Pam

SAVE CHANGES

CANCEL

If there is existing contact information in the file that is no longer accurate, **DO NOT DELETE** the outdated information. Instead, click on the **Edit** icon to edit the existing Contact information.

PROFILE

HISTORY

SERVICES

PROGRAMS

ASSESSMENTS

NOTES

FILES

CONTACT

LOCATION

REFERRALS

CLIENT CONTACTS


ADD CONTACT +

Contact Type	Name	Phone	Email	Date
<div><div></div></div> Client	Test Test	123-456-7899 <div></div>	test.test@gmail.com	04/01/2021 <div></div>

- Then deactivate the **Active Contact** toggle and click **Save Changes**.

Active Contact ☒



Private ☐

Contact Date 04/01/2021 

Created by Staff Your Name Here ⓘ

Created on 05/25/2021

Note


B *I*  

Phone #1: Client's primary phone number

Phone #2: Client's mother, Pam

SAVE CHANGES **CANCEL**

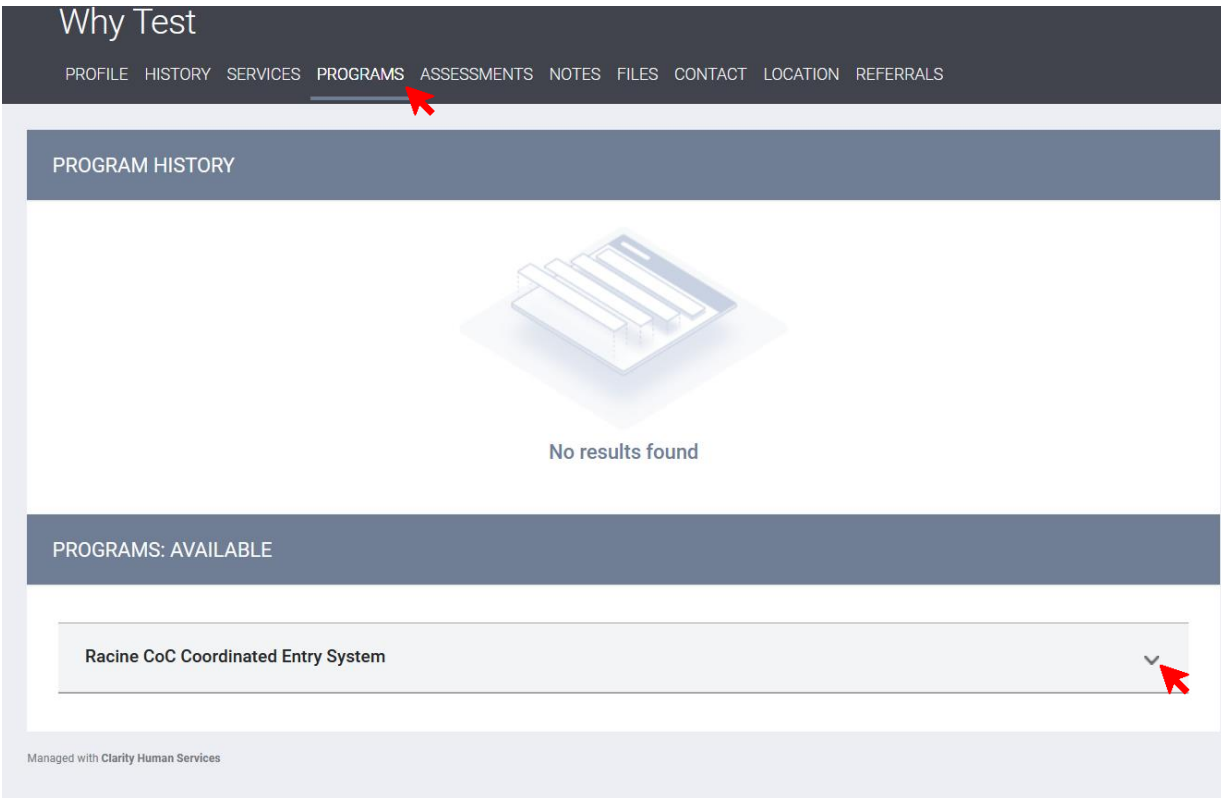
- This will deactivate the old contact information but save it in the historical record. Then add a new contact record.

CLIENT CONTACTS ADD CONTACT 

Contact Type	Name	Phone	Email	Date
(show inactive contacts)				

Create the Program Enrollment

- Go to the Head of Household's file and navigate to the Programs tab. Then click the dropdown arrow for the "Racine City and County CoC Coordinated Entry System" program under the Programs Available section.



- If there are multiple household members that need to be included on the enrollment, be sure to activate the toggle for those household members. Then click **Enroll**.

The screenshot shows an enrollment form. On the left, under 'Funding Source', it says 'HUD:CoC - Supportive Services Only'. Under 'Availability', it says 'Full Availability'. Under 'Include group members:', there are two toggles: 'Wife Test' and 'Baby Test', both of which are turned on and highlighted with red boxes. On the right, under 'Service Categories:', there is a checked box for 'Coordinated Entry Event'. At the bottom left is a 'PRINT DIRECTIONS' link with a printer icon. At the bottom right is a blue 'ENROLL' button with a red arrow pointing to it.

- This will take you to the Enrollment screen for the Head of Household.

The screenshot shows the enrollment screen for the Head of Household. At the top, the title 'Enroll Program for client Test Test' is enclosed in a red rectangular box. Below this, there is a 'Project Start Date' field with the date '04/01/2021' and a calendar icon. At the bottom, the text 'INTERVIEWER'S INFORMATION' is displayed.

- Once you have completed all fields on the screen, you will have the option to click **Save & Close** to complete the enrollment if there are no additional household members, or to click **Save & Next** to move onto the Enrollment screens for the additional household members.
- The Enrollment screens for each household member will auto-populate depending on their relationship to the Head of Household.

Enrollment Screen for Head of Household

- Project Start Date – *enter the date the household completed the CE assessment*
- Relationship to Head of Household – *will only need to fill this in if the household contains more than 1 person*

INTERVIEWER'S INFORMATION

- Interviewer's Name – *enter the name of the staff member completing the interview*
- Contact Information for Person Responsible for Referral – *email and/or phone number*
- Racine Agency Name – *select the interviewer's agency of employment*
- CE Referral type – *CE Homeless Priority List*

LIVING SITUATION AT TIME OF ASSESSMENT

- Type of Residence – *where is the client/household currently sleeping?*
- Length of Stay in Prior Living Situation – *how long has the client/household been sleeping in the above-noted location?*
- Approximate Date Homelessness Started – *the date the client's most recent episode of literal homelessness began. This is often (not always) different than the date the client's overall literal homelessness began.*
- Number of times on the streets, in ES, or SH in the past three years – *"Times" = episodes.*
- Total number of months homeless on the streets, in ES, or Safe Haven in the past three years:
 - If more than 12 months homeless on the street, in emergency shelter, or safe haven, enter the total number of months in the past 3 years

DISABLING CONDITIONS AND BARRIERS

- Disabling Condition – *select Yes or No.*
- Victim of Domestic Violence – *select Yes or No. If yes, the following questions will appear for you to answer:*
 - Last Occurrence of Domestic Violence
 - Are you currently fleeing
- Formerly a Ward of Child Welfare or Foster Care Agency – *select Yes or No.*

HOUSING-SPECIFIC NEEDS

- Special Housing Considerations – *note any housing needs the household has (ex: household requires a wheelchair accessible unit)*

Enrollment Screen for Additional Adults in the Household

- Project Start Date
- Relationship to Head of Household

LIVING SITUATION AT TIME OF ASSESSMENT

- Type of Residence
- Length of Stay in Prior Living Situation
- Approximate Date Homelessness Started
- Number of times on the streets, in ES, or SH in the past three years
- Total number of months homeless on the streets, in ES, or Safe Haven in the past three years:

- If more than 12 months homeless on the street, in emergency shelter, or safe haven, enter the total number of months in the past 3 years
- **DISABLING CONDITIONS AND BARRIERS**
- Disabling Condition

Enrollment Screen for Children in the Household

- Project Start Date
- Relationship to Head of Household

DISABLING CONDITIONS AND BARRIERS

- Disabling Condition

- Once you have finished entering the Enrollment information for each household member, you will click **Save & Close**. You will see the Enrollment has been created for the household, and you will automatically land on the “Provide Services” tab within the Enrollment.

The screenshot shows the 'Why Test' interface. At the top, there is a dark header with the title 'Why Test' and a navigation bar with links: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this is a blue banner with the text 'PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM'. The main content area has a tabbed interface with tabs: Enrollment, History, Provide Services (highlighted with a red box), Assessments, Goals, Notes, Files, Chart, Forms, and an 'X Exit' button. Below the tabs, the 'Services' section is visible, showing a table with one row: 'Coordinated Entry Event'.

Update the Consent to Participate in Coordinated Entry

- Navigate to the **Assessments** tab within the Enrollment.
- Click **Start** to add a **Consent to Participate in Coordinated Entry** assessment.

The screenshot shows the 'Assessments' tab in the 'Why Test' interface. The top banner remains 'PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM'. The navigation bar now highlights 'Assessments' with a red arrow. Below the tabs, the 'Assessments' section is visible, showing a table with one row: 'Consent to Participate in Coordinated Entry'. To the right of this row is a 'START' button, which is highlighted with a red arrow. A link 'LINK FROM ASSESSMENTS' is also visible in the top right corner of the table area.

- Complete the assessment questions.
 - Assessment Date – *this should match the date of the enrollment / the date the client completed the Coordinated Entry Assessment*
 - Does the client consent to participate in Coordinated Entry? – *select “Yes”*

CONSENT TO PARTICIPATE IN COORDINATED ENTRY

Assessment Date

04/01/2021

25

Does the client consent to participate in Coordinated Entry?

Yes

▼

SAVE

CANCEL

If a client declines to participate in Coordinated Entry, this can be documented without creating an enrollment. See [Documenting Clients That Decline to Participate in Coordinated Entry](#) for instructions.

Add a Current Living Situation Assessment

- Click **Start** to add a new “Current Living Situation” assessment.

PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM

Enrollment

History

Assessments

Notes

Files

Forms

× Exit

Assessments

Current Living Situation

START

- The “Add Program Assessment” screen will appear. Make sure that all household members are included in the assessment, then click **Add Current Living Situation**.

ADD PROGRAM ASSESSMENT

Test Test

Husband

Wife Test

Wife

Baby Test

Daughter

ADD CURRENT LIVING SITUATION

- Complete the Current Living Situation for the Head of Household
 - Date of Contact – *this should match the Enrollment date / should be the same date the client completed the Coordinated Entry Assessment.*
 - Current Living Situation – *where is the client / household currently sleeping? This should match what was reported on the Enrollment screen.*

- Living Situation Verified By – *select from the dropdown your agency’s program that is completing the assessment*
- Location Details – *you may type in any notes related to the client’s location; this is optional.*
- If there are no additional household members, you will be prompted to click **Save & Close**. If there are additional adult household members, you will click **Save & Next** to complete the Current Living Situation assessment for the additional household members.

Add Current living situation for client Test Test

Date of Contact04/01/2021

Current Living SituationEmergency shelter, including hotel or motel paid for with emergency shelter

Living Situation Verified ByICA Training Shelter

Location DetailsClient is staying at ABC Shelter.

SAVE & NEXT

CANCEL

- Complete the Current Living Situation Assessment for additional household members, then click **Save & Close**.
- You will now see the Current Living Situation Assessment you added in the Assessment History.

ASSESSMENT HISTORY		
Advanced Search Options View		
Assessment Name	Completed	Details
<div>★</div> <div>Current Living Situation</div> <div>Racine City & County CoC Coordinated Entry System ⓘ</div>	04/01/2021	
<input type="checkbox"/> Other <input checked="" type="checkbox"/> Status Assessment		


Complete the VI-SPDAT / VI-F-SPDAT / VI-Y-SPDAT

- While you are still on the Assessments tab, select the appropriate assessment to complete with the head of household. Please note the custom Racine COVID Response fields were added to the bottom of each VI tools.

Racine WI COVID Response and VI-F-SPDAT Prescreen for Families [V2]	START
Racine WI COVID Response and VI-SPDAT Prescreen for Single Adults [V2]	START
Racine WI COVID Response and VI-Y-SPDAT Prescreen for Transition Age Youth	START

- Racine WI COVID Response and VI-F-SPDAT – *complete this assessment for households with children.*
- Racine WI COVID Response and VI-SPDAT – *complete this assessment for households without children.*

- Racine WI COVID Response and VI-Y-SPDAT – *complete this assessment for youth (18 to 24 years of age) without children.*
 - This assessment was formerly known as the TAY-VI-SPDAT
- Click **Start** to begin the assessment.
 - Complete the Coordinated Entry Assessment questions
 - Assessment Date – *this should be the date the client completed the assessment.*
 - Agency Name – *type in the name of the agency that completed the CE assessment.*
 - Assessment Location – *select the appropriate option.*
 - Assessment Type – *select the appropriate option.*
 - Assessment Level – **Housing Needs Assessment**
 - Primary Language – *select the appropriate response.*

Assessment Date	04/01/2021 
Agency Name	ICA Training Agency
Assessment Location	Case Manager Office ▼
Assessment Type	In person ▼
Assessment Level	Housing Needs Assessment ▼
Primary Language	English ▼

- Complete the VI Assessment and be sure to answer the questions related to COVID/Equity from the Racine CE prescreen form.

RACINE RESPONSE TO COVID/EQUITY FOR HOUSING CES

Do you have an underlying medical condition that puts you at higher risk for COVID19?	No	▼
Essential worker	No	▼
Actual or pending eviction	No	▼
Participant has a criminal background?	No	▼
Household Size of 5 or More Requiring At Least 3 Bedrooms (Due to Age/Gender Mix)	Yes	▼

SAVE
CANCEL

Once completed, click **Save**. This will bring you to the “Program Eligibility Determination” Screen.

Make the Referral to the Community Queue

- On the “Program Eligibility Determination” screen, activate the toggle for **Racine Perm Housing Queue** and click **Refer Directly to Community Queue(s)**.

PROGRAM ELIGIBILITY DETERMINATION

Racine COVID1 Score Summary

COVID RESPONSE

1

Racine COVID1 PRE-SCREEN TOTAL 1

VI-SPDAT-V2 Score Summary

GENERAL0

HISTORY OF HOUSING & HOMELESSNESS0

SOCIALIZATION & DAILY FUNCTION1

0

RISKS1

WELLNESS4

VI-SPDAT-V2 PRE-SCREEN TOTAL 6

☒ Racine Perm Housing Queue

REFER DIRECTLY TO COMMUNITY QUEUE(S)

- On the next screen, there is a section to add notes (optional). Click **Send Referral** to complete the referral to the Community Queue.

REFERRAL: ADD TO CQ

Send to Queues

Racine Perm Housing Queue

Referred Program

Community Queue

Referred to Agency

Community Queue

Referring Agency

Racine City & County CoC Coordinated Entry System

Private

☐

B

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1000000

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SEND REFERRAL

CANCEL

- The referral to the Community Queue is now complete.

Changes successfully saved.

REFERRAL: ASSIGN

Client

Why Test

Referred to

Community Queue - Racine Perm Housing Queue

Referring Agency

Racine City & County CoC Coordinated Entry System

Referred Date

06/22/2021 5:12 PM

Days Pending

0 day(s)

Upload Scanned Coordinated Entry Documents into the Enrollment

The following documents need to be uploaded for each Coordinated Entry Program Enrollment:

1. HMIS Release of Information
2. Racine CES Client Consent for Case Staffing
3. Client Prescreen and Rights & Responsibilities Form

- Within the Program Enrollment, click on the **Files** tab. Click **Add File**.

PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM

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

Client Program Files LINK FROM FILES **ADD FILE**

- Select the appropriate **Category** and **Name** for the file you are uploading, and then select the file from your computer to upload.
 - If it is taking a long time for your file to load into Clarity, try switching to “Basic Uploader”. Once the file is selected click **Add Record**.

UPLOAD A FILE

Category 1. HMIS Release of Information

Name HMIS ROI

File Select File


Trouble attaching files? Switch to the Basic Uploader

Private ☐

ADD RECORD CANCEL

- You will then see the file you uploaded in the Client Program Files.

Client Program Files LINK FROM FILES ADD FILE

 **1. HMIS Release of Information : HMIS ROI**
by Your Name Here on 26 May, 2021 , 230.4 KB
Balance of State CoC ⓘ
[MODIFY FILE](#)

FOR VETERAN SERVICE PROVIDERS: “COORDINATED ENTRY VETERAN INFORMATION” ASSESSMENT

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On the **Assessments** tab there is an assessment called “Coordinated Entry Veteran Information”. This assessment is to be used by Veteran Service Providers when reviewing Veteran referrals to the Coordinated Entry System. To add an assessment, complete the following steps:

- On the **Assessments** tab within the Coordinated Entry Program Enrollment, click **Start** to add a “Coordinated Entry Veteran Information” assessment.

PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM

Enrollment History Provide Services **Assessments** Goals Notes Files Chart Forms × Exit

Assessments LINK FROM ASSESSMENTS

Current Living Situation	START
Status Update Assessment	START
Annual Assessment	START
Coordinated Entry Veteran Information	START

- Complete the assessment questions and then click **Save**.
 - Assessment Date – *date the Veteran Service Provider spoke with / assessed the Veteran*
 - Is Veteran eligible for VA medical services? – *Select Yes or No*
 - Is Veteran refusing federal VA services? – *Select Yes or No*
 - Is client eligible for VASH? – *Select Yes or No*
 - Date of VASH Referral – *fill in the date if a referral was made*
 - Is Veteran eligible for SSVF services? – *Select Yes or No*
 - Date of SSVF Referral – *fill in the date if a referral was made*
 - Is Veteran eligible for VORP Services? – *Select Yes or No*
 - Is Veteran refusing VORP services? – *Select Yes or No*

COORDINATED ENTRY VETERAN INFORMATION

Assessment Date	04/08/2021	
Is Veteran refusing federal VA services?	No	▼
Date of SSVF Referral	04/08/2021	
Is Veteran eligible for SSVF services?	Yes	▼
Is Veteran eligible for VA medical services?	Yes	▼
Is client eligible for VASH?	Yes	▼
Date of VASH referral	04/08/2021	

SAVE **CANCEL**

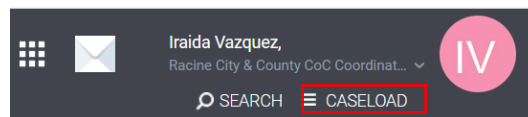
TRACKING YOUR COORDINATED ENTRY ENROLLMENTS / REFERRALS

- When you created the Enrollment into the “Racine CoC Coordinated Entry System” program, you are automatically listed as the “Assigned Staff” in the Enrollment dashboard.

54 DAYS ACTIVE PROGRAM

Program Type:	Group (3)
Program Start Date:	04/01/2021
Assigned Staff:	Your Name Here <input checked="" type="checkbox"/>
Head of Household:	Test Test <input checked="" type="checkbox"/>

- The client / household is automatically added to your **Caseload** tab when you are listed as the Assigned Staff.



- When you click on the **Caseload** tab, you land on the **Active Caseload** tab. This will show you all the active enrollments for which you are listed as the Assigned Staff. This provides an easy way to track your active Coordinated Entry enrollments and referrals.

Racine City & County CoC Coordinated Entry System

ACTIVE CASELOAD STATUS DUE CASE MANAGER

ACTIVE CASELOAD

SEARCH

Program: Racine CoC Coordinated Entry System

Client	Start Date	Length of Stay	Household Members
Why Test	04/01/2021	2 months 21 days	1

- The **Status Due** tab will provide information on households’ enrollment start dates and the last date on which a status update was completed.
 - This tab can assist in tracking when clients are due for a 30 day update to their Coordinated Entry Referral and Enrollment.

Racine City & County CoC Coordinated Entry System

ACTIVE CASELOAD

STATUS DUE

CASE MANAGER

STATUS DUE

SEARCH

Program: Racine CoC Coordinated Entry System

Client	Start Date	Last Status Date	Assessment Due	Household Members
▼ Fred Flintstone	05/01/2021	05/01/2021	06/01/2021	3
▼ Emma Test	05/25/2021	05/25/2021	06/25/2021	3

COMPLETING COORDINATED ENTRY UPDATES

Now that the client is enrolled in the CE Program, any subsequent interactions including referral follow-ups, phone conversations, meetings, etc. will **all** be documented within the CE Program Enrollment. Updates should be completed **every 30 days**.

To document updates, you will need to go into the Head of Household's Program Enrollment for the Balance of State Coordinated Entry Program.

- Click on the **Caseload** tab. This will bring you to the **Active Caseload** tab, where you will click on the Head of Household's name.

Racine City & County CoC Coordinated Entry System

ACTIVE CASELOAD

STATUS DUE

CASE MANAGER

ACTIVE CASELOAD

SEARCH

Program: Racine CoC Coordinated Entry System

Client	Start Date	Length of Stay	Household Members
Why Test	04/01/2021	2 months 21 days	1

- This will bring you directly into the Head of Household's Program Enrollment for the Balance of State Coordinated Entry Program. **It is important that you complete all data entry and updates within the Coordinated Entry Program Enrollment.**

PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM

Enrollment **History** Provide Services Assessments Goals Notes Files Chart Forms [X Exit](#)

Program Service History [LINK FROM HISTORY](#)

Step 1: Add a Status Update Assessment

- Once you are in the Head of Household's Program Enrollment, click on the **Assessments** tab. Then click **Start** to add a **Status Update Assessment**.

PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM

Enrollment History Provide Services **Assessments** Goals Notes Files Chart Forms [X Exit](#)

Assessments [LINK FROM ASSESSMENTS](#)

Current Living Situation	START
Status Update Assessment	START
Annual Assessment	START



- Make sure all members in the household are included on the Status Update Assessment, then click **Add Status Assessment**.

ADD PROGRAM ASSESSMENT [X](#)

<input checked="" type="checkbox"/>	Test Test	Husband
<input checked="" type="checkbox"/>	Wife Test	Wife
<input checked="" type="checkbox"/>	Baby Test	Daughter


[ADD STATUS ASSESSMENT](#)


- Update the information on the Status Update Assessments to best reflect the client's current situation and chronicity status. Then click **Save & Next** to complete the Status Update Assessment for additional household members or click **Save & Close** if your household consists of only one person.

Project Status Date	05/01/2021 
Type of Residence	Place not meant for habitation (e.g., a vehicle, an abandoned building, bu✓
Length of Stay in Prior Living Situation	Two to six nights ✓
Approximate Date Homelessness Started	04/26/2021 
Times Homeless in the Past Three Years	Four or more times ✓
Total Months Homeless in the Past Three years	More than 12 Months ✓
If more than 12 months homeless on the street, in emergency shelter, or safe haven, enter the total number of months in the past 3 years	15 ✓
Domestic Violence Victim/Survivor	No ✓
Special Housing Considerations	Household requires a wheelchair accessible unit.
Outcome of CE Update	Follow up completed, still needs housing, remains on list ✓

- NOTE: There are no fields to update on the Status Update Assessment for children under the age of 18. You are simply going to make sure the **Project Status Date** is correct for the child, and then click **Save & Close**.

Status Update for client Baby Test

Project Status Date
05/01/2021 

 REMINDER:

- If the household's living situation has changed, add a new "Current Living Situation" Assessment

SAVE & CLOSE

CANCEL

If the client / household's living situation has changed since the Assessment was completed or since the last Status Update, move on to Step 2.

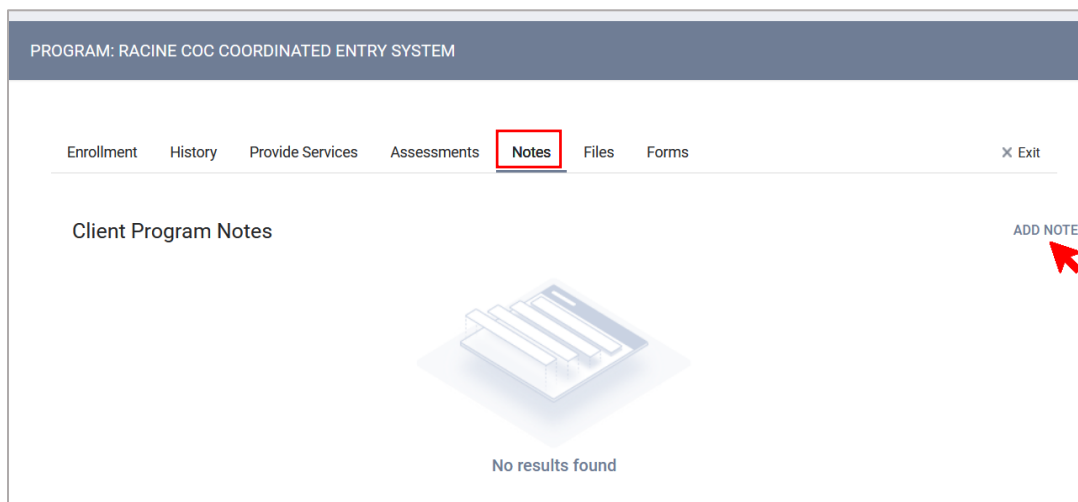
If the client / household remains in the same living situation from the last Status Update, move on to Step 3.

Step 2: Add a Current Living Situation Assessment

- When completing the Status Update Assessment if the client / household's living situation has changed since the last update, you will also need to add a new Current Living Situation Assessment.
- Follow the steps outlined in the [Add a Current Living Situation Assessment](#) section of this guide to create a new Current Living Situation Assessment.

Step 3: Add a Note

- Now click on the **Notes** tab within the program enrollment. Then click **Add Note**.



PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM

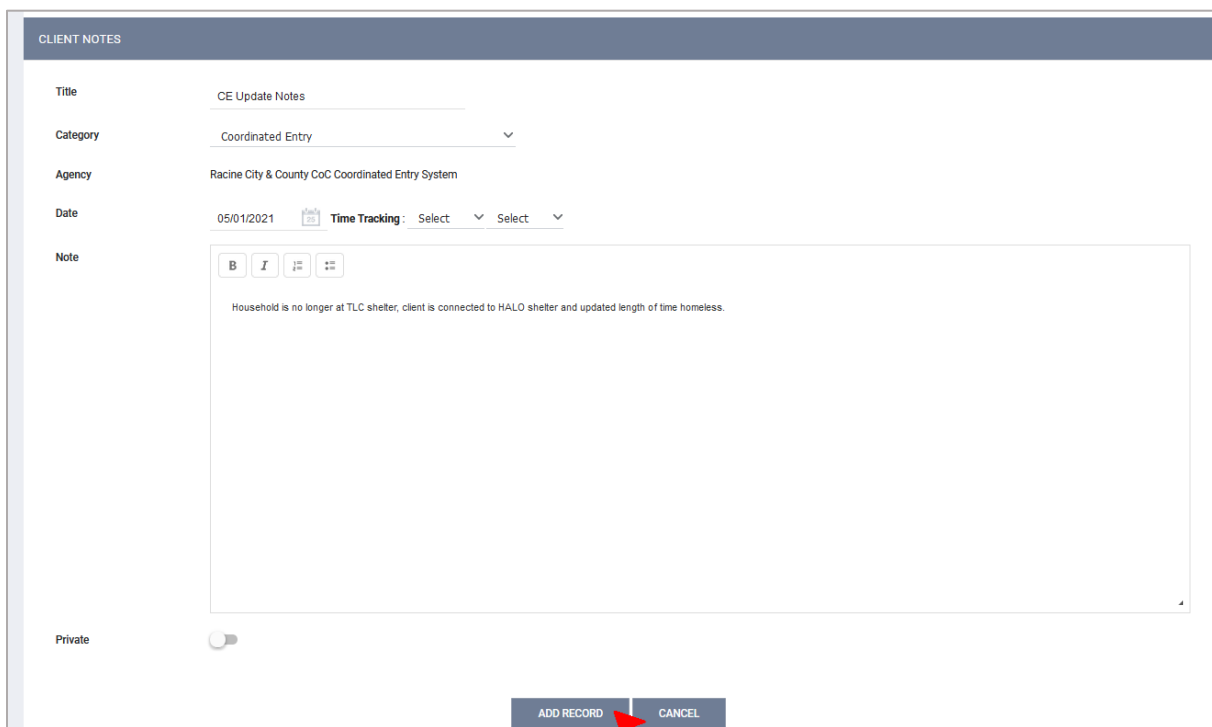
Enrollment History Provide Services Assessments **Notes** Files Forms X Exit

Client Program Notes

ADD NOTE

No results found

- Complete all relevant information on the Note page, then click **Add Record** once complete.
 - Title – *add a title for your note*
 - Category – *select “Coordinated Entry”*
 - Date – *select the date on which you completed the update*
 - Time Tracking – *leave blank*



CLIENT NOTES

Title CE Update Notes

Category Coordinated Entry

Agency Racine City & County CoC Coordinated Entry System

Date 05/01/2021 Time Tracking: Select Select

Note

Household is no longer at TLC shelter, client is connected to HALO shelter and updated length of time homeless.

Private

ADD RECORD CANCEL

- The Note will appear on the **Notes** tab in the program enrollment.

PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM

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

Client Program Notes ADD NOTE

Title	Category	Staff	Date
CE Update Notes Racine City & County CoC Coordinated Entry System ⓘ	Coordinated Entry	Iralda Vazquez	05/01/2021

DOCUMENTING CLIENTS THAT DECLINE PARTICIPATION IN COORDINATED ENTRY

If a client is offered the opportunity to receive a Coordinated Entry assessment and referral and they decline, you will need to document this information in the client file.

- Go to the Head of Household's client file and navigate to the top-level **Assessments** tab. Click **Start** to create a new **Consent to Participate in Coordinated Entry** Assessment.

Why Test


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


ASSESSMENTS

Consent to Participate in Coordinated Entry START

- Complete the assessment questions.
 - Assessment Date – *this should be the date that a Coordinated Entry assessment and referral were offered to the client and they declined.*
 - Does the client consent to participate in Coordinated Entry? – *select "No"*

CONSENT TO PARTICIPATE IN COORDINATED ENTRY

Assessment Date 04/01/2021 

Does the client consent to participate in Coordinated Entry? No 

Private ☐

SAVE CANCEL

- If a client eventually accepts an opportunity to receive a Coordinated Entry assessment and referral, create an enrollment and follow the steps outlined in [Adding an Individual or Household to the Coordinated Entry System](#) at that time.

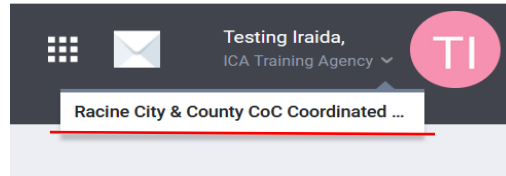
REMOVING A CLIENT FROM THE COORDINATED ENTRY SYSTEM

You will remove a client from the Coordinated Entry System if they are no longer in need of housing assistance, if the referring agency is unable to contact the client, or if the client requests to be removed from the Coordinated Entry System.

There are two steps to removing a client from the Coordinated Entry System:

1. Remove the client from the Community Queue
2. Exit the client from the Racine CoC Coordinated Entry Program

Before you begin, make sure that you are switched into the Racine City and County CoC Coordinated Entry System agency.



Step 1: Remove the Client from the Community Queue

- Go to the client's file and click on the **History** tab (if the household consists of more than one person, go the Head of Household's file).

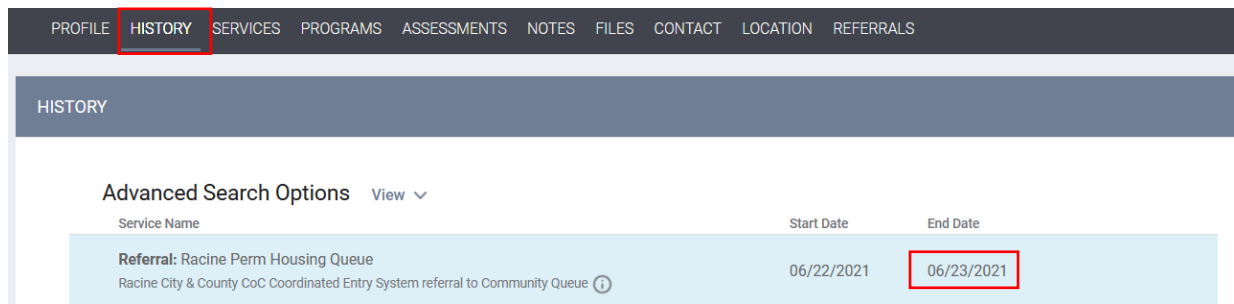
Then click on the **Edit** button to edit the pending Referral to the **Racine Perm Housing Queue**.

A screenshot of a web application interface. At the top, there's a navigation bar with tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The 'HISTORY' tab is selected, indicated by a red arrow. Below the tabs is a section titled 'HISTORY'. Underneath, there's a table of referrals. The first row is highlighted in light blue and contains the text 'Referral: Racine Perm Housing Queue' and 'Racine City & County CoC Coordinated Entry System referral to Community Queue'. A red arrow points to this row. The table also shows 'Start Date' (06/22/2021) and 'End Date' (Pending). Below the table, there are checkboxes for 'Program', 'Service', 'Referral', 'Reservation', and 'Assessment'. The 'Referral' checkbox is checked.

- Scroll to the **Remove from Queue** section of the referral.
 - Select the appropriate **Reason for Removal**. If there is a secondary field that appears, be sure to complete that field as well.
 - Select the **Queue Removal Date**.
 - Click **Save Changes**.

A screenshot of a form titled 'REMOVE FROM QUEUE'. It has two main sections. The first section is 'Reason for Removal' with two dropdown menus: 'Whereabouts Unknown' and 'No Contact In 90 Days'. The second section is 'Queue Removal Date' with a date input field showing '06/23/2021' and a calendar icon. At the bottom of the form, there are two buttons: 'SAVE CHANGES' and 'CANCEL'. A red arrow points to the 'SAVE CHANGES' button. Below the form is a section labeled 'NOTES'.

- In the **History** tab, you will now see that the Referral has an End Date and is closed.

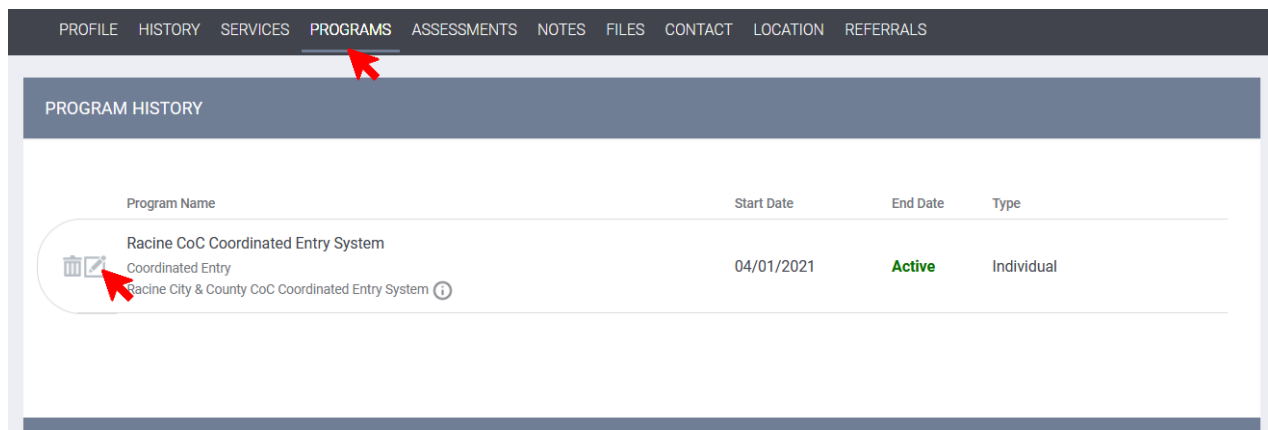


The screenshot shows the 'HISTORY' tab selected in the top navigation bar. Below the tab, there is a section titled 'Advanced Search Options' with a 'View' dropdown. A table displays a referral record:

Service Name	Start Date	End Date
Referral: Racine Perm Housing Queue Racine City & County CoC Coordinated Entry System referral to Community Queue ⓘ	06/22/2021	06/23/2021

Step 2: Exit the Household from the Racine CoC Coordinated Entry System Program

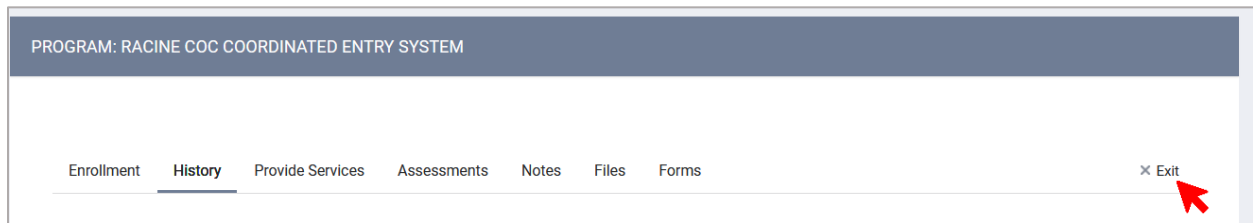
- While you are still in the Head of Household's file, click on the **Programs** tab. Click the **Edit** button to edit the Racine CoC Coordinated Entry System program enrollment.



The screenshot shows the 'PROGRAMS' tab selected in the top navigation bar. Below the tab, there is a section titled 'PROGRAM HISTORY'. A table displays the program enrollment:

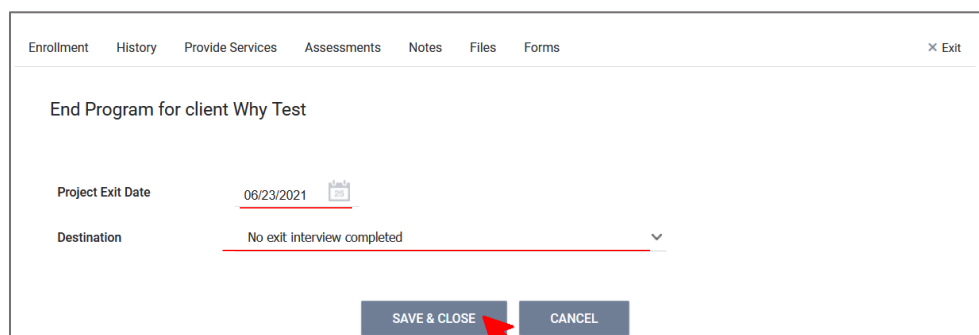
Program Name	Start Date	End Date	Type
Racine CoC Coordinated Entry System Coordinated Entry ⓘ Racine City & County CoC Coordinated Entry System ⓘ	04/01/2021	Active	Individual

- Click **Exit** to view the Exit Screen.



The screenshot shows the 'PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM' screen. At the bottom, there is a navigation bar with tabs: Enrollment, History, Provide Services, Assessments, Notes, Files, Forms, and an 'X Exit' button. A red arrow points to the 'X Exit' button.

- Fill in the **Project Exit Date** and the **Destination** information. Then click **Save & Close**. The household is now exited from the Racine CoC Coordinated Entry program and is fully removed from the Coordinated Entry System.



The screenshot shows the 'Exit' screen for the program. It has a title 'End Program for client Why Test'. Below the title, there are two fields:

Project Exit Date: 06/23/2021 (with a calendar icon)

Destination: No exit interview completed (with a dropdown arrow)

At the bottom, there are two buttons: 'SAVE & CLOSE' and 'CANCEL'. A red arrow points to the 'SAVE & CLOSE' button.

IMPORTANT NOTE: Exits to Permanent Housing Removes household from the Coordinated Entry System

- A client will also be automatically removed from the Coordinated Entry System if they are exited from another program (ex: emergency shelter, street outreach, prevention, etc.) into a permanent destination.

EXAMPLE OF WHAT THIS LOOKS LIKE IN CLARITY

- A client is enrolled in the **Racine CoC Coordinated Entry System** program and the **ICA Racine Training Shelter** program at the same time.

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System ⓘ	02/01/2021	Active	Individual
ICA Racine Training Shelter Emergency Shelter: Entry/Exit Date ICA Racine Training Agency	08/01/2020	Active	Individual


- A staff member at the **ICA Racine Training Shelter** exits the client from their program on 6/1/2021 into a permanent destination (rental by client, no ongoing housing subsidy).

PROGRAM: ICA TRAINING SHELTER


Enrollment History Provide Services Assessments Goals Notes Files Chart Forms **✕ Exit**

End Program for client Apple Pie

Project Exit Date

06/01/2021 

Destination

Rental by client, no ongoing housing subsidy 

- When the staff member hits **Save & Close** at the bottom of the exit screen, two messages will appear on their screen informing them that the client will be removed from the Community Queue and exited from their Coordinated Entry enrollment.

The staff member will click **OK** to proceed.

wisconsin-train.clarityhs.com says

You entered data indicating this client is within a permanent destination. As a result, this client will be removed from the Community Queue. Please confirm.

OK

Cancel

wisconsin-train.clarityhs.com says

You entered data indicating that this client is within a permanent destination. As a result, this client will be exited from Coordinated Entry enrollments. Please confirm.

OK

Cancel

- On the **Programs** tab, we can now see that the client was automatically exited from the **Racine CoC Coordinated Entry** program on 6/1/2021. The Project Exit Date and the Destination will match the information that was documented on the **ICA Racine Training Shelter** program exit.

Program Name	Start Date	End Date	Type
Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System ⓘ	02/01/2021	06/01/2021	Individual
ICA Racine Training Shelter Emergency Shelter: Entry/Exit Date ICA Racine Training Agency	08/01/2020	06/01/2021	Individual

PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM

Enrollment

History

Assessments

Notes

Files

Forms

✕ Exit

End Program for client Good Luck Bear

Project Exit Date

06/01/2021

23

Destination

Rental by client, no ongoing housing subsidy

▼

- In the **History** tab, we can see that the Referral to the Racine Perm Housing Queue was closed on 6/1/2021 as well.

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS			
HISTORY			
Advanced Search Options View ▾			
Service Name	Start Date	End Date	
Referral: BoS Housing Balance of State CoC referral to Community Queue ⓘ	05/11/2021	06/01/2021	
ICA Training Shelter ICA Training Agency	02/01/2021	06/01/2021	
Balance of State Coordinated Entry Balance of State CoC	01/21/2021	06/01/2021	

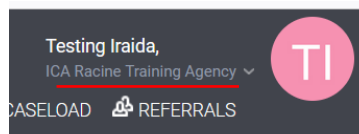
- The staff member that created the enrollment and referral will receive a notification through the Clarity messaging system that the client has been automatically removed from the Coordinated Entry program.

INBOX: MESSAGE		
<div>AA Admin Admin @ System</div> <div>To Testing Iraida Jun 29, 2021 at 11:15 AM</div> <div>Dear Testing Iraida,</div> <div>The following Coordinated Entry programs have been automatically exited:</div>		
Client	Program Name	Start Date
2E96AC15C	Racine CoC Coordinated Entry System Racine City & County CoC Coordinated Entry System	02/01/2021

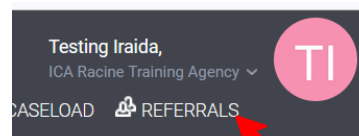
ACCEPTING A REFERRAL FROM THE LIST

Getting Started

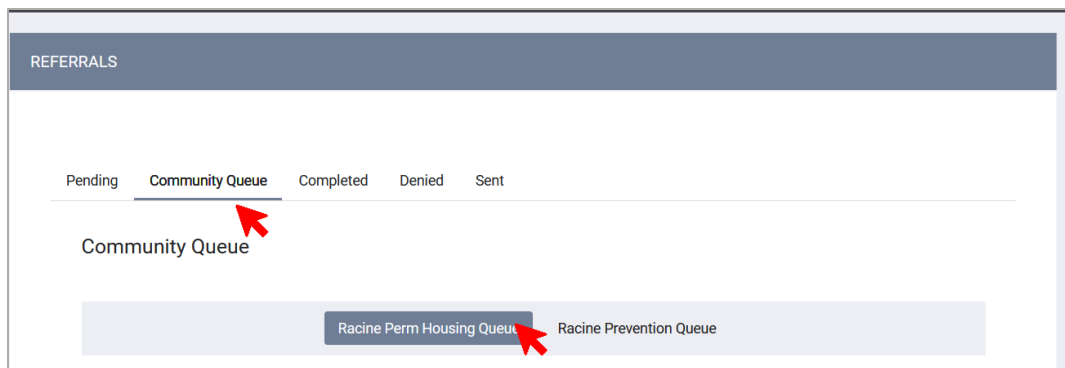
- First make sure you are switched into the agency accepting the client (generally your primary agency).
 - You cannot be switched into the “Racine City and County CoC Coordinated Entry System” agency to complete this step.



- While you are on the home page, you will see the **Referrals** tab is visible. Click on the **Referrals** tab.



- Click on the **Community Queue** tab, and make sure the **Racine Perm Housing Queue** is selected.



Reassign the Referral to Your Agency's Program

The Coordinated Entry System Administrator is responsible for reassigning the referral to a Permanent Housing Program (PSH and RRH) after receiving an email notification from the housing provider of the vacancy. The email serves as documentation of compliance with Coordinated Entry.

- As you scroll down you will see a list of all clients with a referral to the Community Queue. Use the Search field to locate the client who has prioritized; you can search by client name or unique identifier.

Community Queue

Racine Perm Housing Queue

Racine Prevention Queue

Search

0D5DCFD9

Active Agency

ICA Racine Training Agency

Eligible Clients Only

Mode

Standard

Characteristic

-- Select --

Sort By

Default

SEARCH

Client	Referral Date	Days Pending
Tube Test Referred by: Racine City & County CoC Coordinated Entry System ⓘ	04/12/2021	78
Good Luck Bear Referred by: Racine City & County CoC Coordinated Entry System ⓘ	06/29/2021	0
Friend Bear Referred by: Racine City & County CoC Coordinated Entry System ⓘ	06/29/2021	0
Fred Flintstone Referred by: Racine City & County CoC Coordinated Entry System ⓘ	06/29/2021	0

- Once you have located the client on the Community Queue, click the **Edit** button to view the client's referral.

Racine Perm Housing Queue

Racine Prevention Queue

Search

0D5DCFD9

Active Agency

ICA Racine Training Agency

Eligible Clients Only

Mode

Standard

Characteristic

-- Select --

Sort By

Default

SEARCH

Client	Referral Date	Days Pending
Fred Flintstone Referred by: Racine City & County CoC Coordinated Entry System ⓘ	06/29/2021	0

- Scroll to the **Reassign** section. In the **Program** dropdown, you will see a list of your agency's programs. Select the program at your agency that is accepting the referral, then click **Save Changes**.

REASSIGN

Program

ICA Racine Training RRH ▼

-- Select Program --

ICA Racine Training PSH

ICA Racine Training RRH

ICA Racine Training Shelter

SAVE CHANGES CANCEL

- This reassigns the referral from the Community Queue to your agency's program. If you click on the **Pending** tab, you will now see the client's referral is pending for your agency to review.

REFERRALS

Dashboard **Pending** Community Queue Analysis Completed Denied Sent Availability Open Units

Pending Referrals

Search

Mode Standard ▼

Sort By Program Name ▼

Characteristic -- Select -- ▼

☐ Eligible Clients Only

SEARCH

Client	Referral Date	Qualified	Days Pending
Fred Flintstone Program: ICA Racine Training RRH Referred by: Racine City & County CoC Coordinated Entry System ⓘ	06/29/2021	Reassigned	0 total 0 pending

- From here your agency will either:
 - Enroll the client / household into your agency's program.
 - Deny the referral and...
 - Send the referral back to the Community Queue, OR
 - Completely close the referral if the client no longer needs or wants assistance.

Enrolling a client with an Accepted Referral

- If a client is eligible for and accepts the offered programming, you will then enroll the client into the program for which the client prioritized.
- When you click to enroll the client into the program, you will notice there is a toggle on the left side of the screen that will say **“Program Placement a result of Referral provided by Racine COC”**. Make sure the toggle is activated, then click **Enroll**.

PROGRAMS: AVAILABLE

ICA Training Motel Vouchers

ICA Training Permanent Supportive Housing

ICA Training Rapid Rehousing

Funding Source

HUD:CoC – Rapid Re-Housing

Availability

Full Availability

HOUSING AVAILABILITY:

Households without children

6 Beds in 6 Units

Households with at least one adult and one child

6 Beds in 3 Units

Program Placement a result of Referral provided by Racine City & County CoC Coordinated Entry System

Include group members:

Wilma Flintstone

Pebbles Flintstone

1 pending referral(s). Oldest 0 days.

PRINT DIRECTIONS

ENROLL

- Complete the enrollment as you normally would. When you view the **Programs** tab, you will see the enrollment has a small link icon on the right side of the page. This indicates that the enrollment was linked to the Coordinated Entry referral, and that you completed the enrollment correctly.
 - NOTE: at this point you have accepted the Coordinated Entry referral, but the Coordinated Entry Enrollment remains active. The enrollment will remain active while the client is in housing search.

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System ⓘ	06/29/2021	Active	Individual
ICA Racine Training RRH PH - Rapid Re-Housing ICA Racine Training Agency ⓘ	06/29/2021	Active	Group

EXITING THE CLIENT FROM THE COORDINATED ENTRY SYSTEM

- The client will be completely removed from the Coordinated Entry System once they have secured housing and a **Housing Move-In Date** has been documented.
- When you go into the client's Enrollment and enter the Housing Move-In Date, a screen will pop up asking to confirm that the client is housed and will be exited from the Coordinated Entry enrollment. Click **OK**.

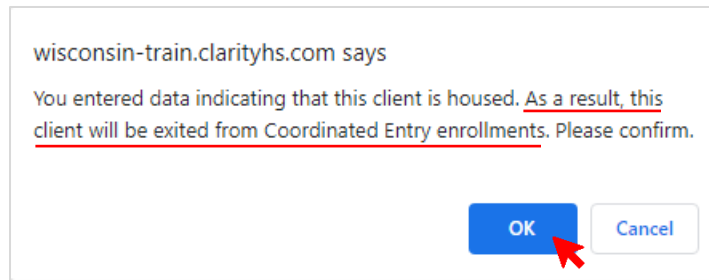
COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date

07/20/2021

25

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- The client will now be exited from the **Racine CoC Coordinated Entry System** program, with an exit destination reflecting the program they have been housed through.

PROGRAM: RACINE COC COORDINATED ENTRY SYSTEM

Enrollment History Assessments Notes Files Forms

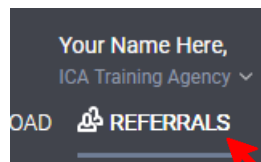
End Program for client Tenderheart Bear

Project Exit Date 07/20/2021 

Destination Rental by client, with RRH or equivalent subsidy 

Denying a Prioritized Referral

- If a client declines the offered programming for which they have prioritized, or a program denies a referral due to a client's ineligibility for the program, the referral must be documented as **Denied**.
- Click on the **Referrals** tab from the home page.



- On the **Pending** tab, search for the client. Then click on the **Edit** button to edit the pending referral.

REFERRALS

Pending

Community Queue

Completed

Denied

Sent

Availability

Pending Referrals

Search

Mode

Standard

Sort By


Default

Characteristic

-- Select --

Eligible Clients Only

SEARCH

Client	Referral Date	Qualified	Days Pending
 <div> <div>Funshine Bear</div> <div>Program: ICA Racine Training RRH</div> <div>Referred by: Racine City & County CoC Coordinated Entry System</div> </div>	07/19/2021	Reassigned	1 total 0 pending

- Change the **Status** to “Denied”. When you change the status, additional fields will appear. Complete the fields accordingly, then click **Save Changes**.
 - Send to Community Queue – *Select “Yes” to return to the client to the Community Queue, or “No” to completely close the client’s referral.*
 - Denied by Type – *select “Client” or “Provider”.*
 - Denied Reason – *select appropriate answer.*
 - Denied Information – **REQUIRED.** *Document notes on why the referral was denied.*

Status

Denied

Send to Community Queue

Yes

Denied By Type

Client

Denied Reason

Client refused services

Denial Information

Client declined programming due to program's location. Returned to the Community Queue.

Private

SAVE CHANGES

CANCEL

- This information will now show up in the **History** section of the referral.

HISTORY			
Activity	Date	Days Pending	Staff
Denied: Reassigned to Community Queue: Racine Perm Housing Queue	07/20/2021 2021-07-20 10:29:04	0	Your Name Here ICA Racine Training Agency
Program Referral: ICA Racine Training RRH, ICA Racine Training Agency	07/20/2021 2021-07-20 10:19:15	1	Iraida Vazquez ICA Racine Training Agency i
Added to Community Queue: Racine Perm Housing Queue	07/19/2021 2021-07-19 10:12:37	0	Iraida Vazquez Racine City & County CoC Coordinated Entry System i

- It also will be visible in the Client's File on the **History** tab.

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS			
HISTORY			
Advanced Search Options View v			
Service Name	Start Date	End Date	
Referral: Racine Perm Housing Queue Racine City & County CoC Coordinated Entry System referral to Community Queue i	07/19/2021	Pending	
Referral: ICA Racine Training RRH Racine City & County CoC Coordinated Entry System referral to ICA Racine Training Agency i	07/19/2021	Denied	