HAMPTON ROADS HOMELESS MANAGEMENT INFORMATION SYSTEM

Coordinated Entry Training Manual

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Introduction

This manual provides step-by-step guidance on the data entry workflow for the Coordinated Entry System (CES) for the following Continuums of Care (COCs):

- Greater Virginia Peninsula Homeless Consortium (GVPHC), VA-505
- Portsmouth Homeless Action Consortium (PHAC), VA-507
- Southeastern Virginia Homeless Coalition (SVHC), VA-501

The U.S. Department of Housing and Urban Development (HUD) released standard data collection and entry requirements for all continuums receiving CoC funding for Coordinated Entry in 2019. Those standards were required to be in place by October 2020 throughout our local CoCs.

This manual provides step-by-step guidance on the data entry workflow for recording data in the Homeless Management Information System (HMIS) to include both the required HUD standards and local requirements as agreed upon by each CoC.

Additionally, this manual is categorized by the participation level agencies have either agreed to fulfill or been assigned to act as within the CES: Access Points, Assessment Points, and Housing Providers.

- **Access Points** are agencies or projects that participate as a front door to the Coordinated Entry System that enroll households experiencing a housing crisis.
- **Assessment Points** are agencies or projects that provide case management services to households, specifically completing the Housing Needs Assessment and presenting clients for services at the case-conferencing meetings.
- **Housing Providers** are comprised of agencies or projects that operate Housing Projects dedicated to assisting households experiencing a housing crisis.

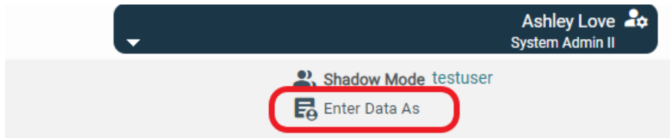
Fundamentals of CES Data Entry

Enter Data As (EDA) Mode

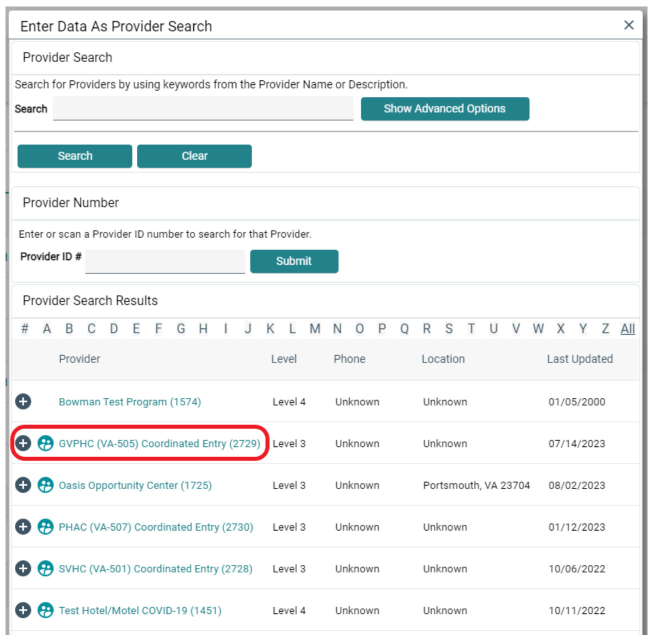
Enter Data As (EDA) mode must be enabled before recording any data for the Coordinated Entry System in HMIS. When completed with Coordinated Entry System data entry, you must exit EDA mode.

Enable EDA Mode:

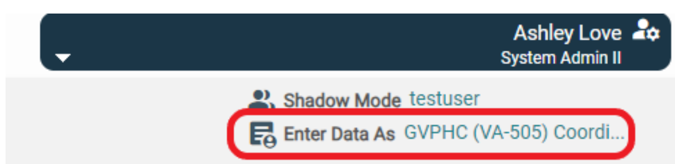
1. In the upper right corner of the HMIS window click on the words **Enter Data As.**



2. The window that appears will list all HMIS projects associated with a user's account. Click the plus icon next to the appropriate CoC's Coordinated Entry Project.

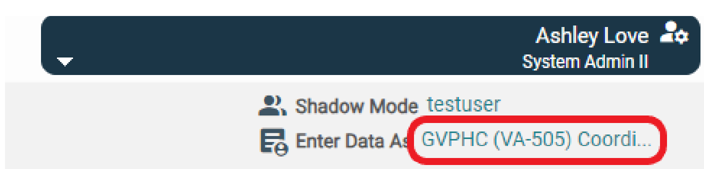


3. To confirm EDA mode has been enabled successfully, look again to the upper right corner of the HMIS window and verify the project selected shows next to the **Enter Data As** label.



Disable EDA mode

1. To disable EDA mode, click on the text next to the **Enter Data As** label in the upper right corner of the window. The text will be removed when EDA mode is disabled.

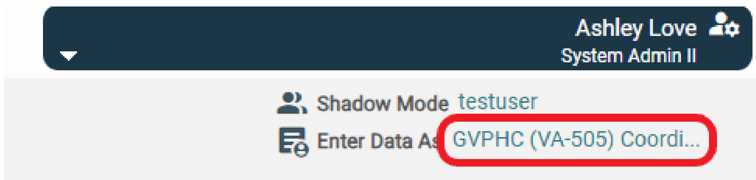


Release of Information

There are two very important, but different, Releases of Information (ROI) related to Coordinated Entry.

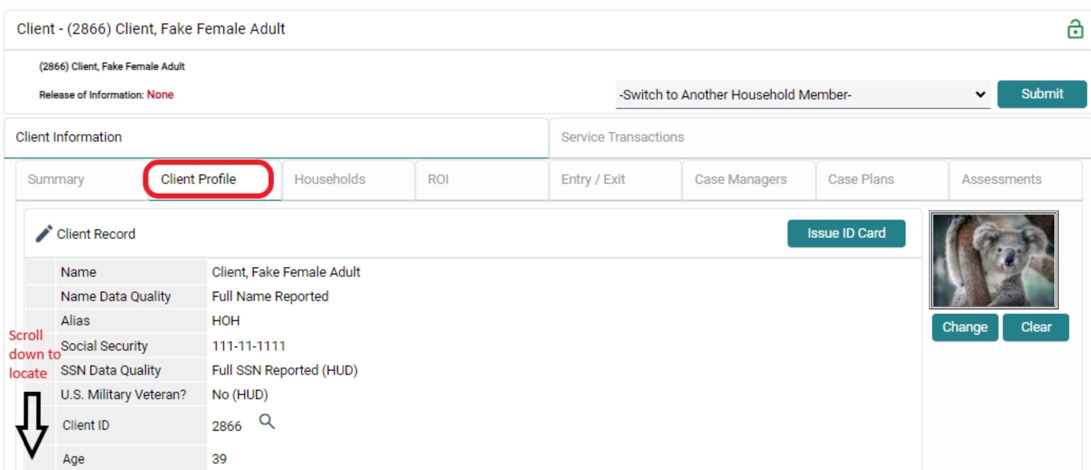
- Continuum of Care's (COC) Coordinated Entry ROI – This document, when fully executed, allows an agency to take an individual's or household's case to a table for case conferencing. This includes being able to discuss their background and personal information with the purpose of connecting them to housing and other resources. The CoC's Coordinated Entry ROI can be found at www.hamptonroadsendshomelessness.org.
- HMIS ROI – This ROI provides the ability for information that is captured in the HMIS system to be visible to other agencies that use the HMIS.

Before recording any ROIs, ensure EDA mode is enabled by looking at the upper right corner of the HMIS window. The Coordinated Entry project name should show next to the words **Enter Data As.**

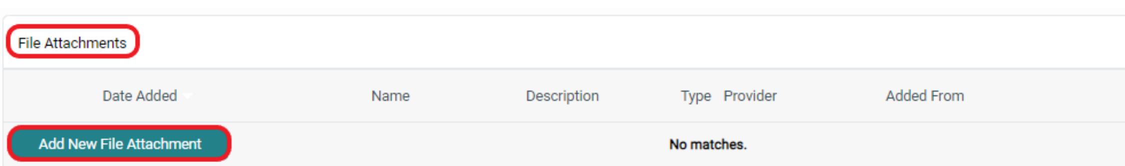


CoC's Coordinated Entry ROI:

1. Navigate to the **Client Profile** tab in the client's record in HMIS.

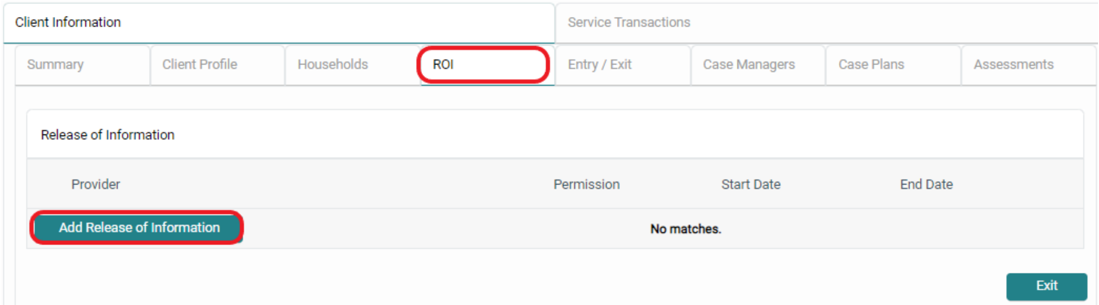


2. Scroll down to locate the **File Attachments** section. Use the "Add New File Attachment" button to browse for the appropriate ROI file to upload.

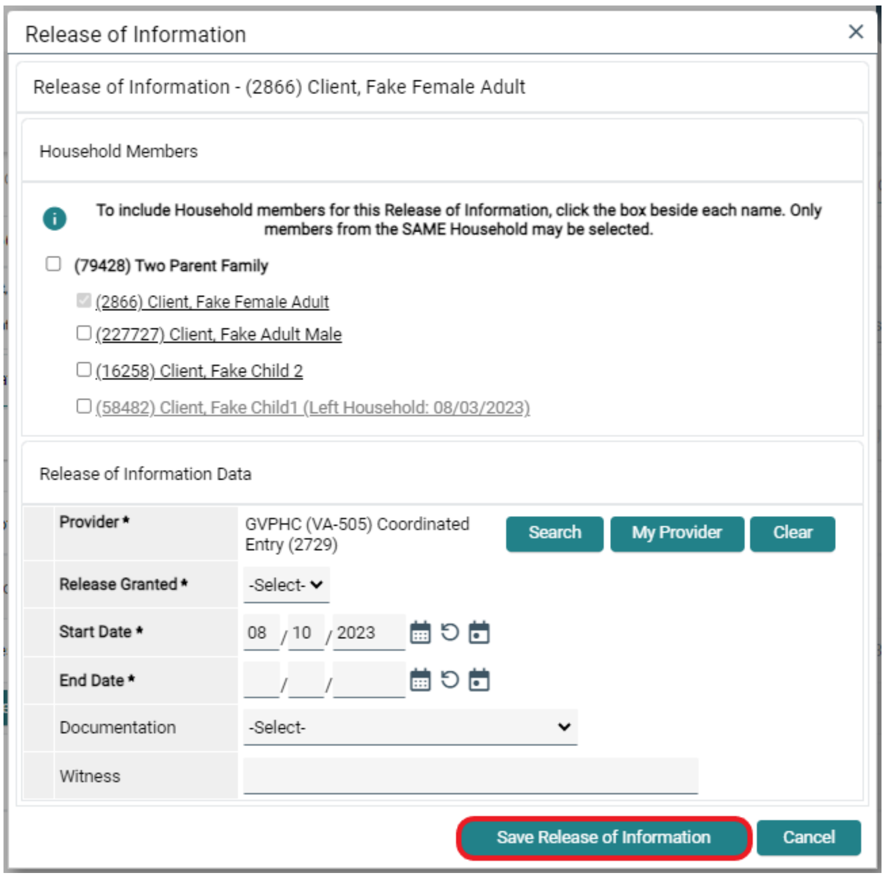


HMIS ROI:

1. Navigate to the **ROI** tab in the client's record in HMIS. Click the "Add Release of Information" button.



2. Complete the fields in the window that appears and click the "Save Release of Information" button.



> Helpful Hint: A verbal ROI is valid for one calendar year. A written ROI is valid for three calendar years.

Access Points

This section will outline HMIS responsibilities for Access Points. These responsibilities include:

- Verify/Update Household Members
- Executing verbal or written Releases of Information (ROI)
- Creating Coordinated Entry (CE) Project Entry
    - Recording information about Attempting Diversion
    - Screening for shelter and prevention assistance
    - Making referrals to Assessment Point(s) when applicable

It is important to note that some Access Points also serve as an Assessment Point. Access Points that **do not** serve as an Assessment Point will need to connect individuals or households with an Assessment Point.

REMEMBER: Enter Data As (EDA) mode must be enabled before recording any data for the Coordinated Entry System in HMIS. Guidance for enabling/disabling EDA mode can be found on page 5.

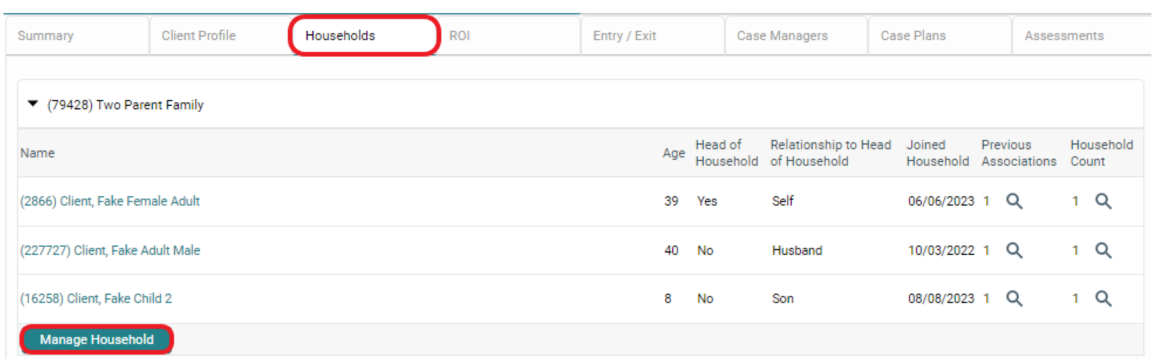
Verify/Update Household Members

Before moving forward with the CE Project Entry process, it is important to review and update the household. This will allow household members to be properly grouped together when creating the CE Project Entry which allows for accurate reporting on household characteristics like makeup and size.

1. With EDA mode enabled search for the Head of Household's client record in **Clients**.

> Helpful Hint: Mark the Adult with the highest vulnerabilities as the Head of Household to ensure household is prioritized for services appropriately.

2. Click the **Households** tab to review additional household members. Make sure that ALL members are accounted for on this page. If a household member needs to be added or removed click the "Manage Household" button. More information about creating and managing households can be found in the *Hampton Roads HMIS Training Manual* .



Executing verbal or written Releases of Information (ROI)

See **Fundamentals of CES Data Entry** > Release of Information beginning on page 6.

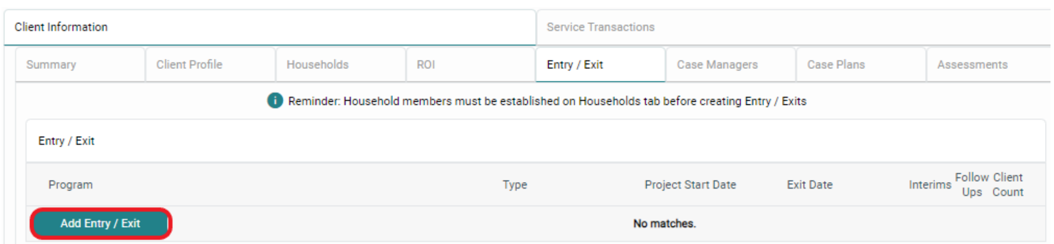
Creating Coordinated Entry (CE) Project Entry

When creating the CE Project Entry, there are several steps that will be completed:

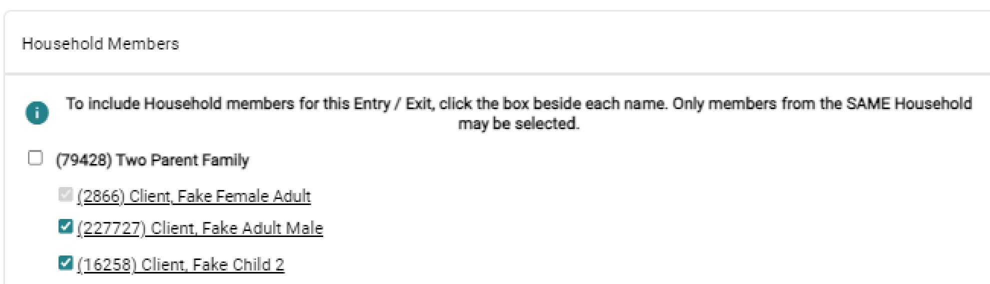
- Recording Universal Data Elements
  - ALL household members
- Recording Current Living Situation
  - ALL Adults (persons 18 years or older)
- Recording additional screening questions
  - Head of Household only
- Recording the CE Assessment
  - Head of Household only
- Recording CE Event(s)
  - Head of Household only

First, begin creating the CE Project Entry:

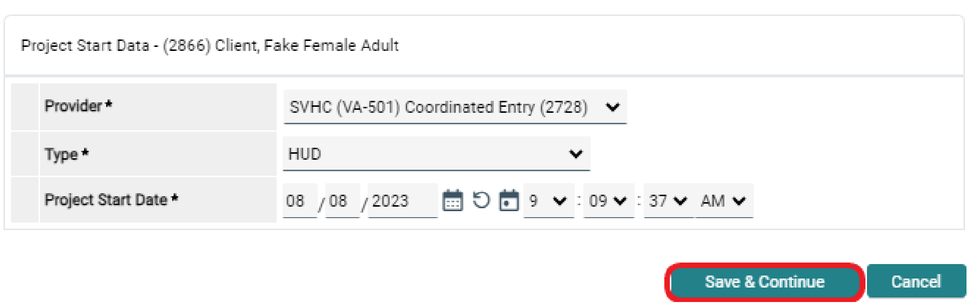
1. In the **Client Profile**, click the **Entry / Exit** tab and select the "Add Entry / Exit" button.



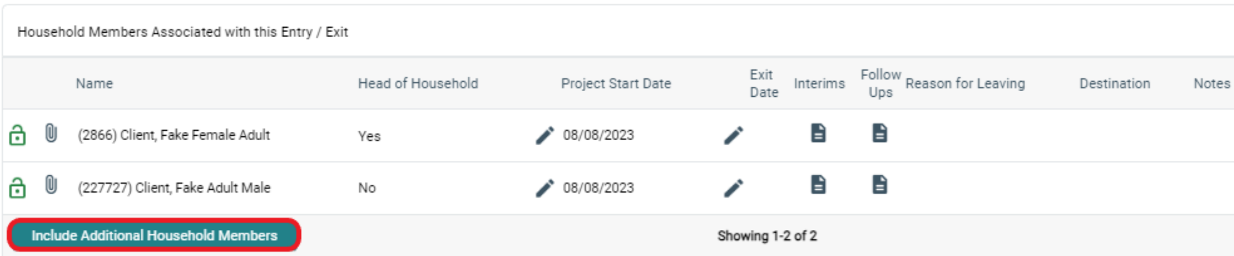
2. In the **Household Members** section of the window that appears, click the box next to each household member's name to include them in the entry.



3. The **Provider** field will default based on the EDA Mode. Select "HUD" from the **Type** field drop-down menu. **Project Start Date** should be the date the individual or household was first contacted. Click the "Save and Continue" button.

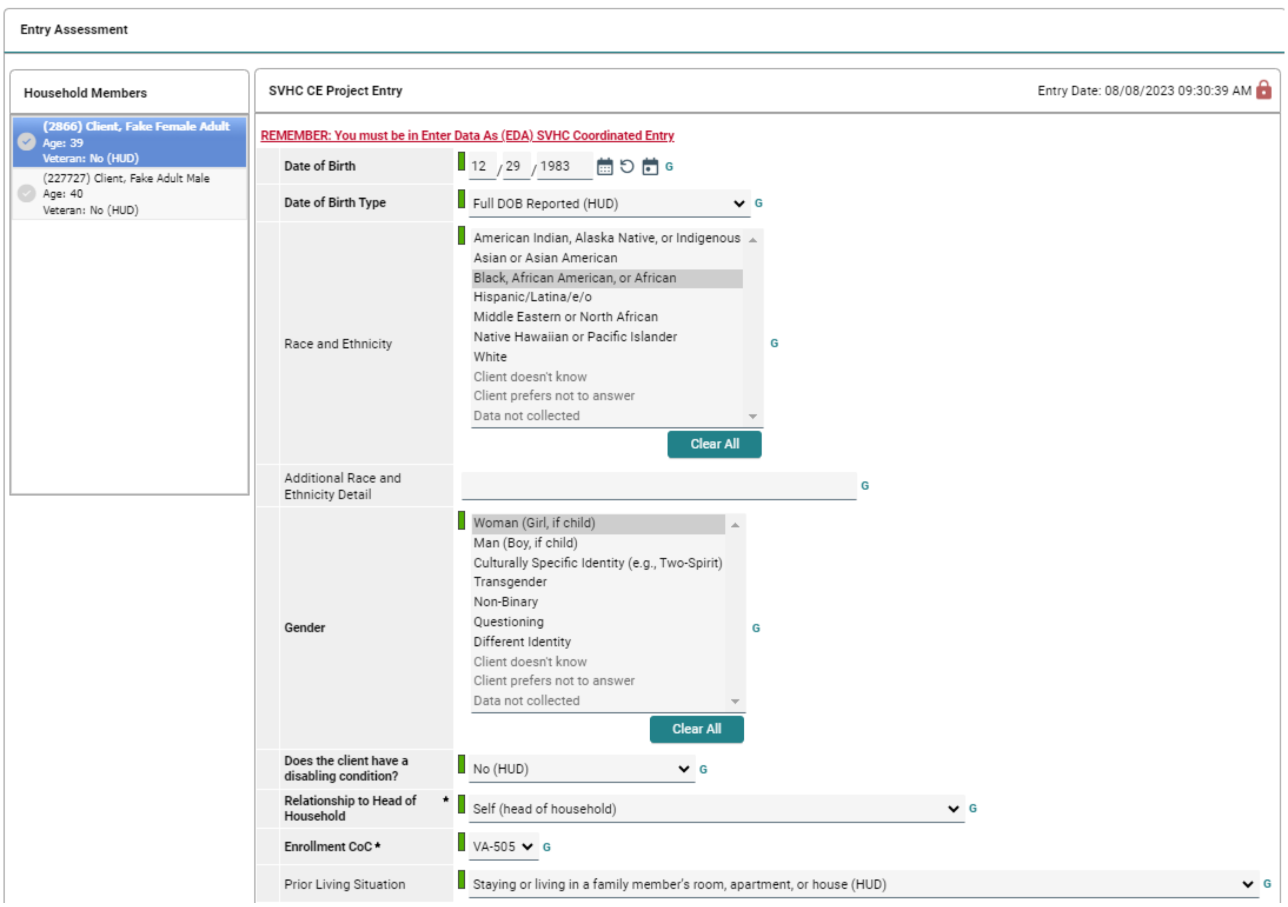


4. A new **Entry / Exit Data** window will open. The top two sections will summarize the previous selections. If a family member was forgotten in the previous window, they can be added by clicking the "Include Additional Household Members" button.



Recording Universal Data Elements:

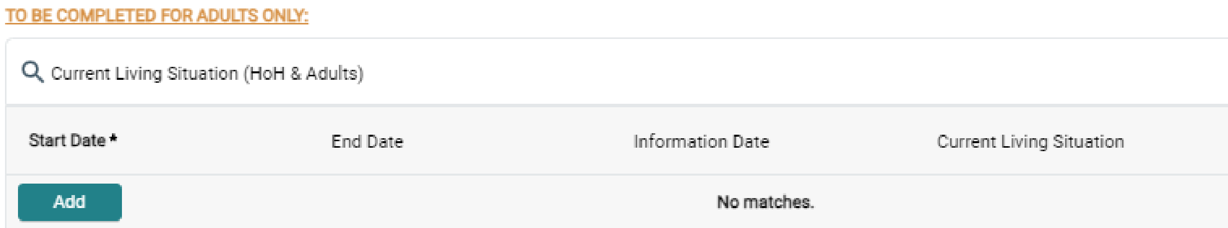
1. Once all household members have been successfully added to the CE Project Entry, scroll to the **CE Project Entry** section and complete the Universal Data Elements for the Head of Household. This section will be completed for all household members before the CE Project Entry is saved.



Helpful Hint: The **Prior Living Situation** question triggers Conditional Logic. This means that only relevant questions will be displayed following the selected answers for those fields. Complete all fields that appear.

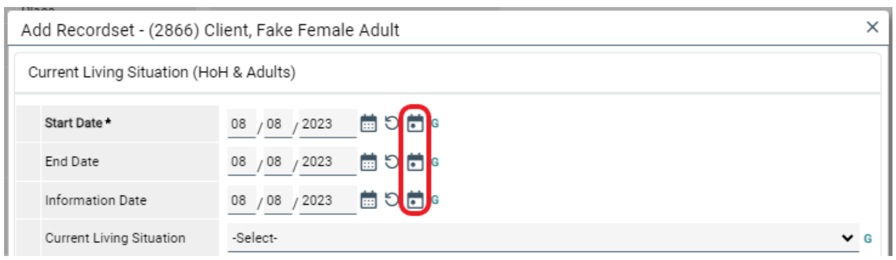
Recording Current Living Situation:

1. Scroll to the **Current Living Situation** section and click the "Add" button. This section will be completed for All Adult household members (persons 18 years or older).



2. The **Current Living Situation** window will appear.

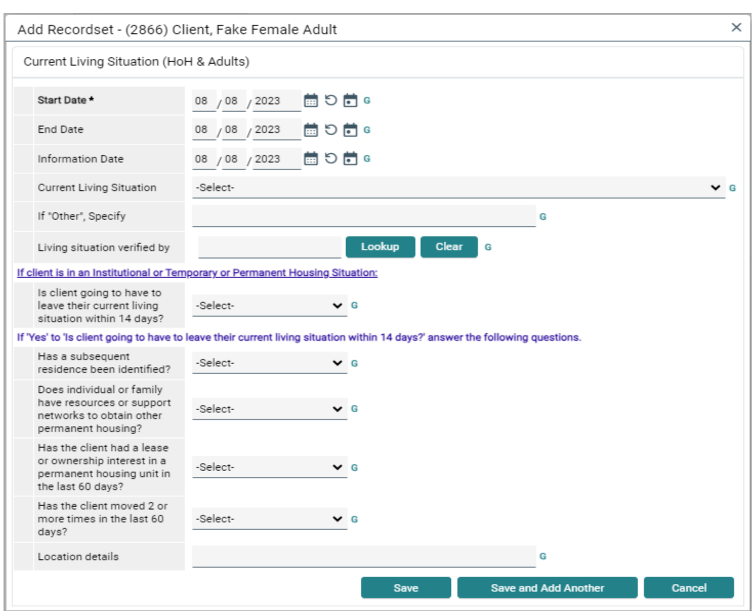
   Click the calendar with a dot icon to populate the first three fields: **Start Date, End Date, Information Date.** This sets each field to the Project Start Date as expected.



3. Select an option from the **Current Living Situation** drop-down menu

   a. If something from the HOMELESS SITUATIONS section of the drop-down menu is selected, stop and click the "Save" button at the bottom of the window and skip to step 12 below.

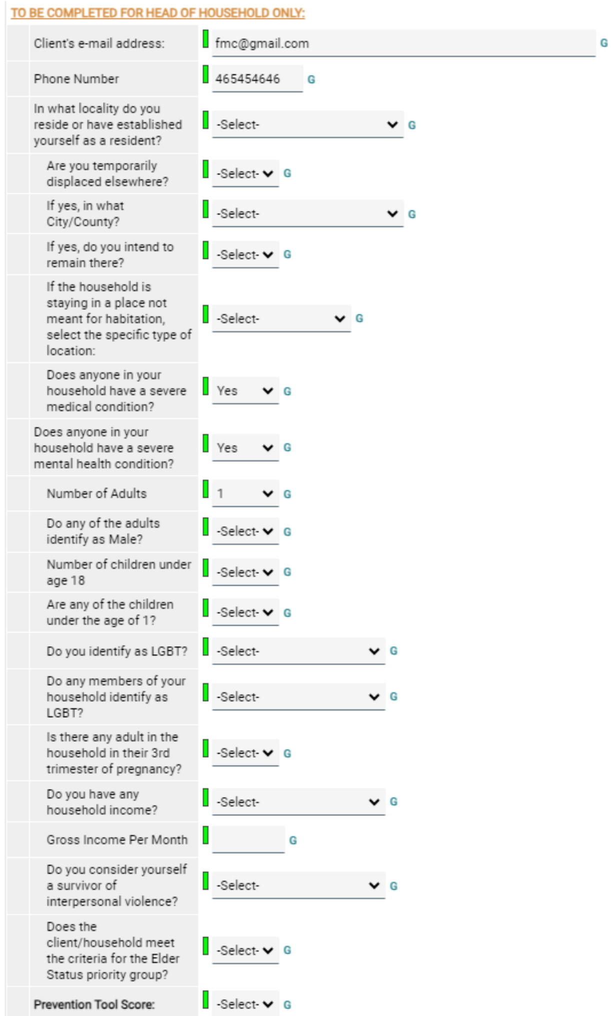
   b. If something from the INSTITUTIONAL or TEMPORARY or PERMANENT HOUSING SITUATIONS section of the drop-down menu is selected, continue answering the additional questions on the form.



Helpful Hint: The **Living situation verified by** field should only be used when recording data on behalf of an agency other than your own. The **Location details** field can be used to provide more information about an individual's living situation location.

Recording additional screening questions:

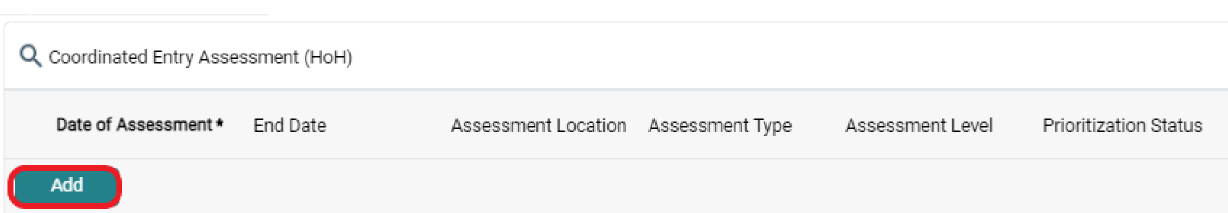
1. Complete the additional screening questions for the Head of household only.



> Helpful Hint: When recording **Gross Income per Month**, be sure this reflects the ENTIRE household when asked.

Recording the CE Assessment:

1. Use the **Coordinated Entry Assessment** section to record that an Access Point has conducted a Crisis Needs Assessment. Click the "Add" button to bring up the relevant fields.



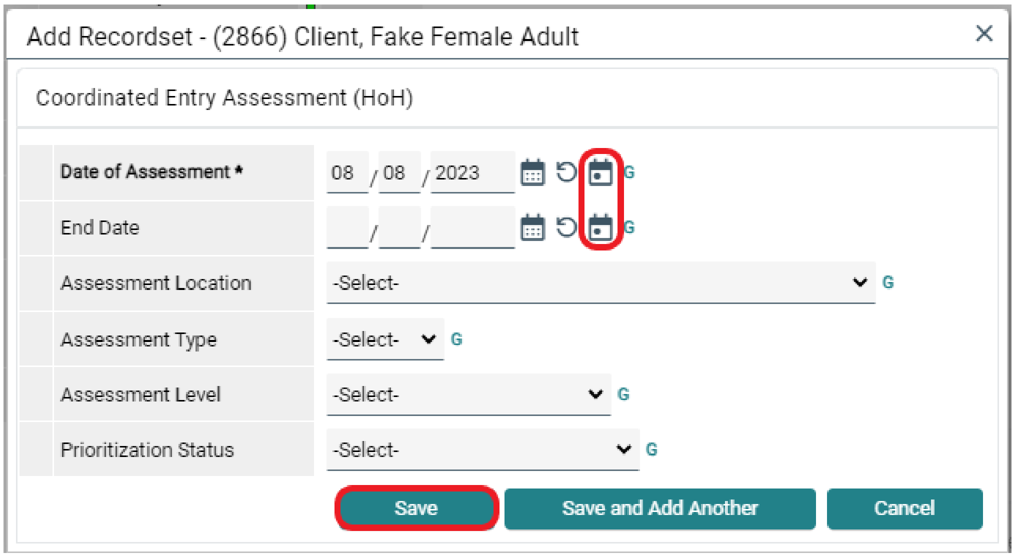
2. The **Coordinated Entry Assessment** window will appear. Click the calendar with a dot icon to populate the first two fields: **Date of Assessment** and **End Date**

   Fill in the **Assessment Location** and **Assessment Type.**

   Select *Crisis Needs Assessment* for the **Assessment Level** field.

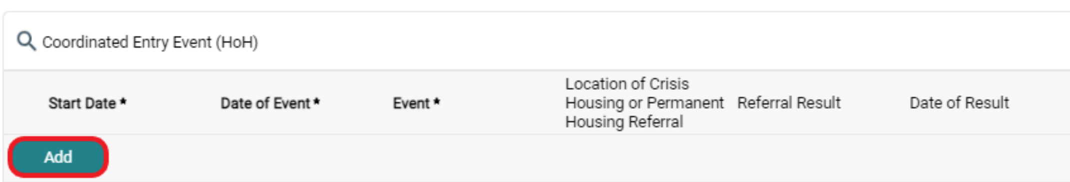
   Select *Not Placed on Prioritization List* for the **Prioritization Status** field.

   Finally click the "Save" button.



Recording CE Event(s):

1. Use the **Coordinated Entry Event** section to record that an Access Point has attempted Diversion, and to record any referrals that are made. Click the "Add" button.



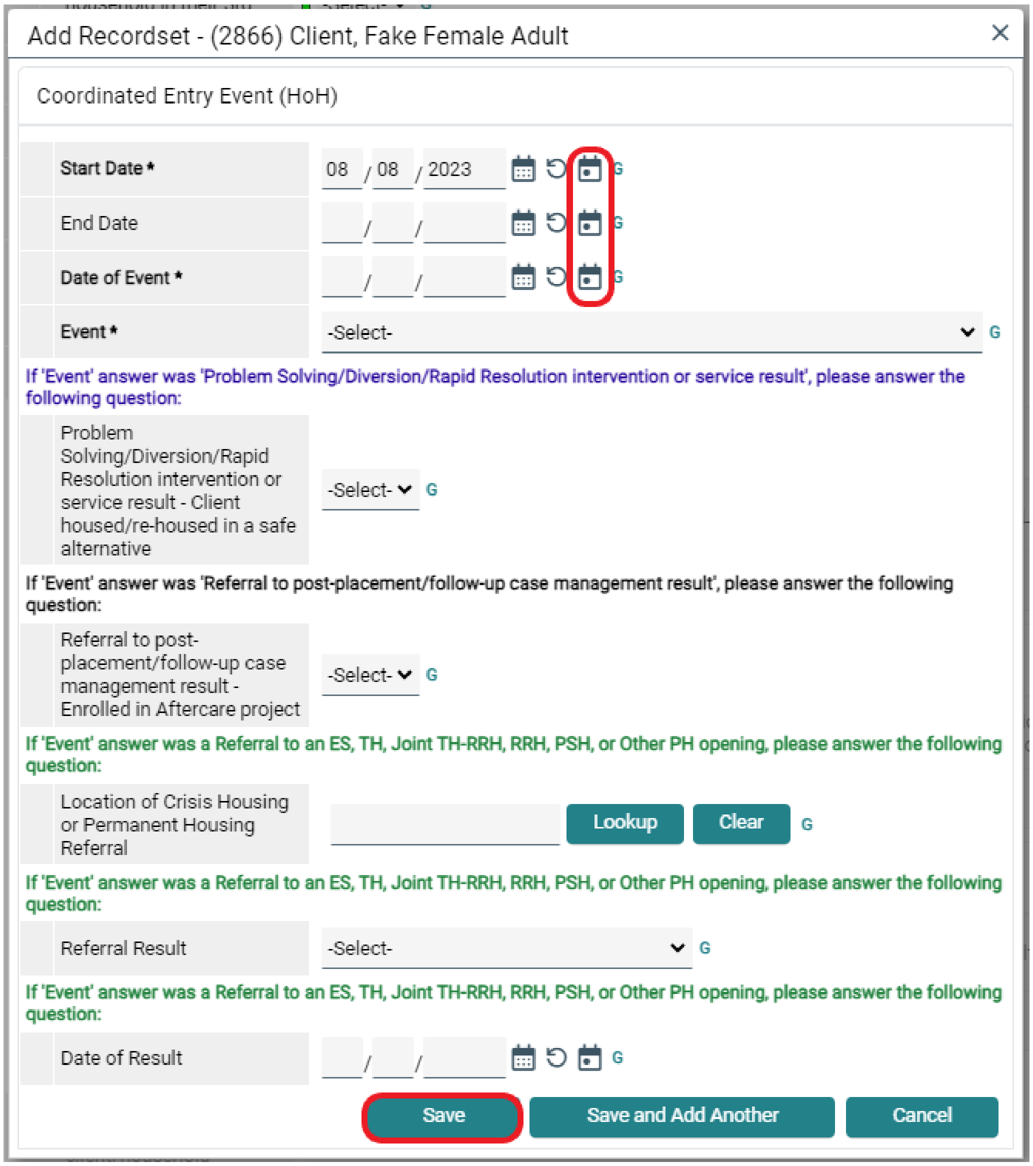
> Helpful Hint: Everyone should have at a minimum one CE Event for Diversion. This is recorded as *Problem Solving/Diversion/Rapid Resolution Intervention or service* in the drop-down menu.

2. The **Coordinated Entry Event** window will appear. Click the calendar with a dot icon to populate the first three fields: **Start Date, End Date,** and **Date of Event.**

   Fill in the **Event** field. This selection will determine which of the following questions you should complete.

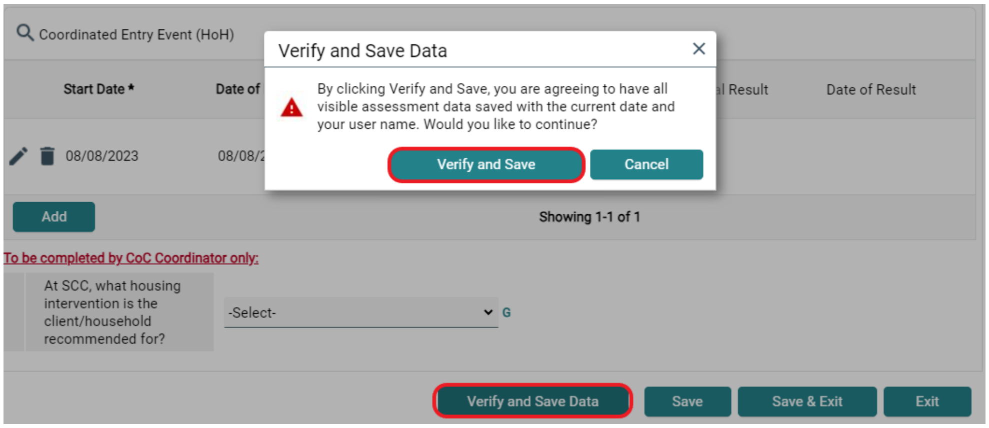
   Read each of the next questions carefully to determine if it is relevant. If so, complete the associated data entry.

   Finally click the “Save” or “Save and Add Another” button.



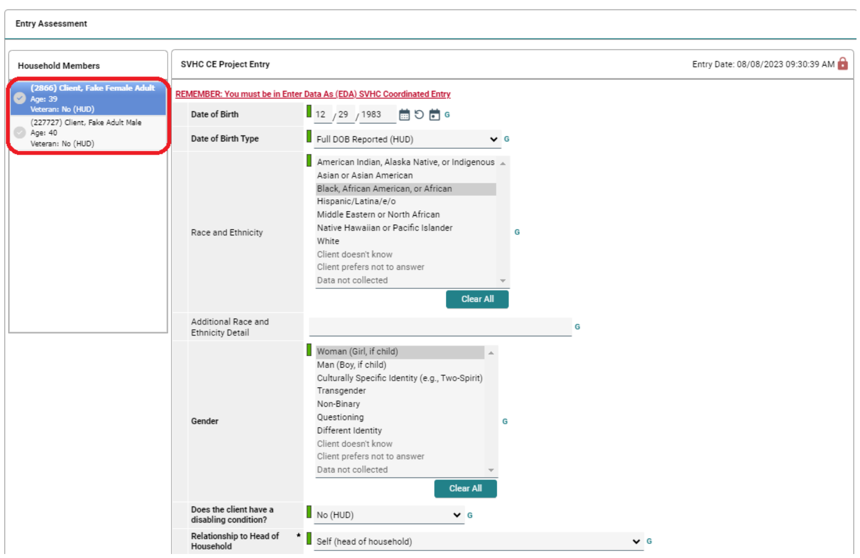
Helpful Hint: If the **CE Event** was Diversion and *Yes* was selected for the follow up question, the indication is that the individual or household was successfully diverted away from homelessness. This means the client or household should be immediately exited from the CE Project.

3. Once all Coordinated Entry Events have been added, click the "Verify and Save Data" button at the bottom of the screen. A pop-up will appear. Click "Verify and Save Data" again.



Repeat applicable steps for all additional household members:

1. Scroll back to the top of the **Entry Assessment** window and repeat the Assessment process for each household member by selecting their name in the **Household Members** section.



> Helpful Hint: Be sure to click "Save and Verify Data" after completing the assessment for each household member.

2. When you are finished recording information for each household member, click the "Save and Exit" button on the bottom right-hand side of the screen.

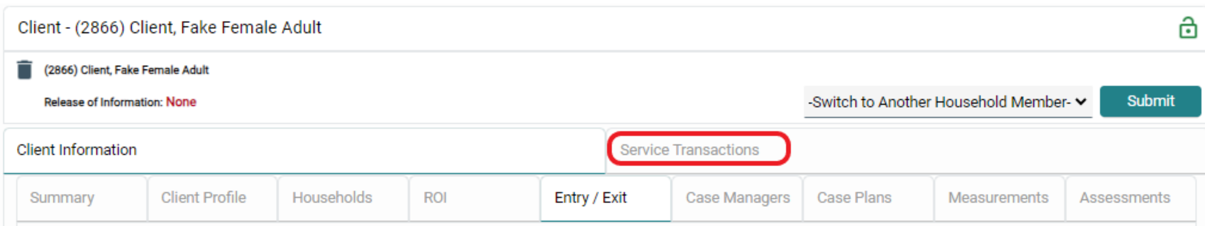
   The CE Project Entry will now appear on the **Entry / Exit** tab.

If the client or household is successfully diverted, the CE Project Exit should be completed. Guidance on completing a CE Project Exit can be found in the Recording CE Project Exit section on page 39.

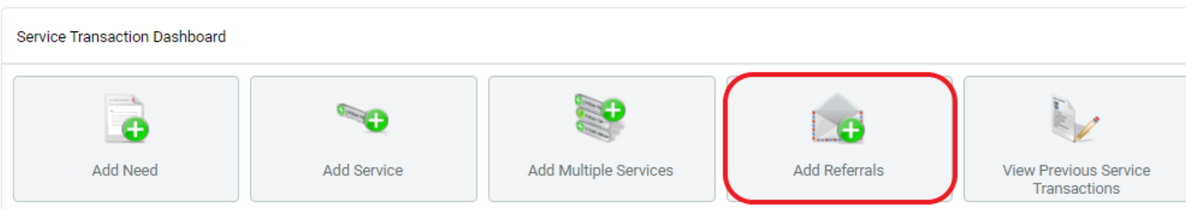
Sending Referrals

When a Coordinated Entry Event is recorded, indicating that a referral has been made, it is important to create the Referral Service Transaction. This is the action in HMIS that sends a notice to the agency receiving the referral. Without it, the intended agency is unaware of the referral.

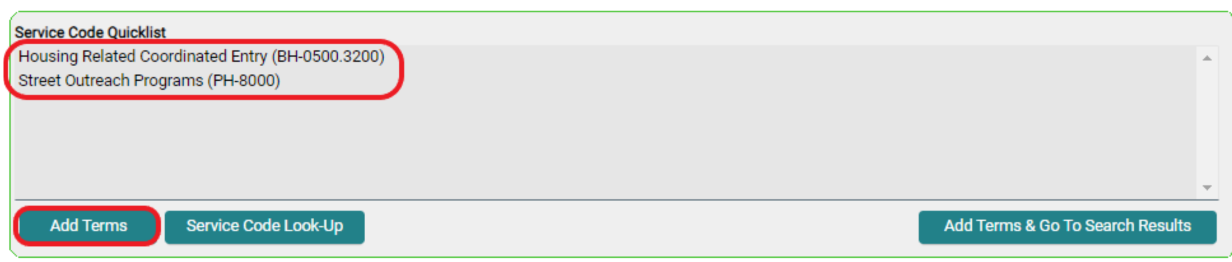
1. In the **Client Profile**, select the **Service Transactions** tab.



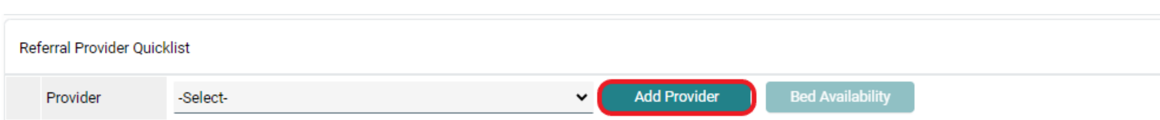
2. Then click "Add Referrals" from the **Service Transaction Dashboard**.



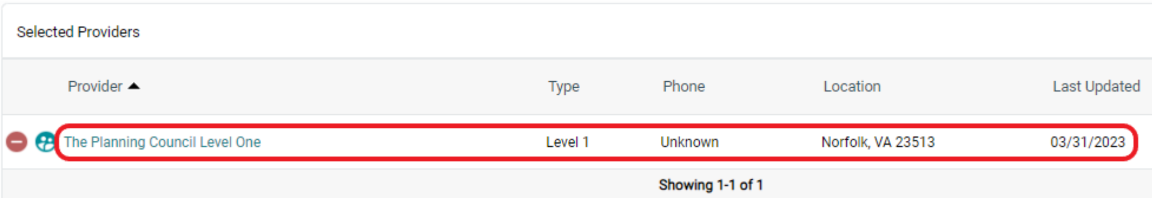
3. The window that appears begins with a **Household Members** section. Skip that section and continue to the **Needs Assignment** area. Locate the **Service Code Quicklist**.
    a. If referring someone to Street Outreach, select *Street Outreach Programs* and click the "Add Terms" button.
    b. If referring someone to an Assessment Point, select *Housing Related Coordinated Entry* and click the "Add Terms" button



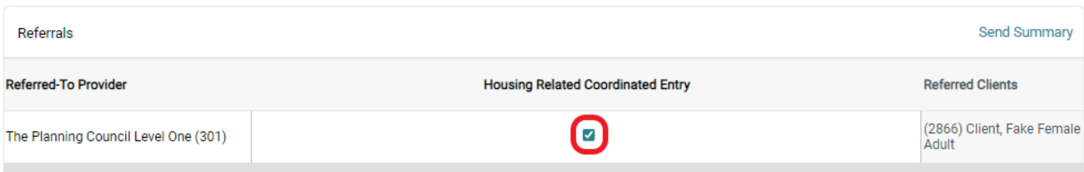
4. Continue to the **Referral Provider Quicklist** section, choose the agency the client will be referred to from the drop-down menu, and click the "Add Provider" button.



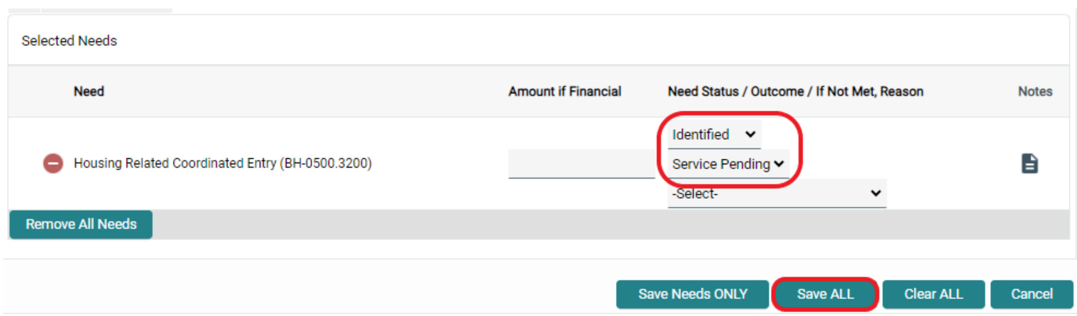
5. When successfully selected the provider's information will appear in the next section, **Selected Providers**.



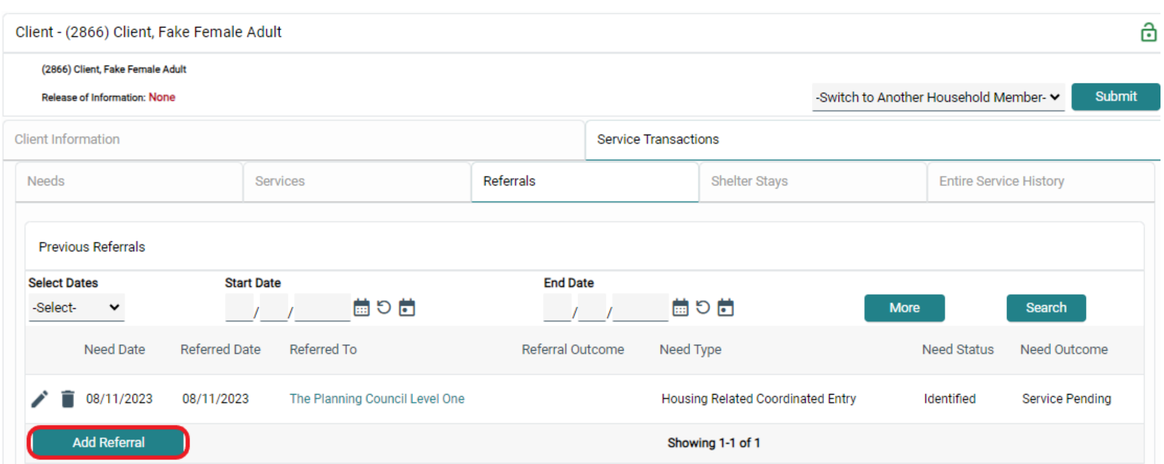
6. Scroll past the **Referral Data** section, it has prepopulated the date already, to find the **Referrals** section. Review the referral and confirm by clicking the checkbox. Note: if this step is missed the referral will not send.



7. Scroll to the final section, **Selected Needs**, and ensure the **Need Status** defaulted to *Identified*, and then select *Service Pending* for **Outcome** and click the "Save ALL" button.



8. The screen will now show the **Service Transactions > Referrals** tab, to reflect the referral has been entered. If additional referrals need to be added, click the "Add Referral" button and repeat these steps.



Assessment Points

This section will outline HMIS responsibilities for Assessment Points. These responsibilities include:

- Executing verbal or written Releases of Information (ROI) as needed
- Updating the Coordinated Entry (CE) Project Entry/Exit
    - Recording information about Attempting Diversion
    - Recording VI-SPDAT and Prioritization Tool (if applicable to your CoC) information

REMEMBER: Enter Data As (EDA) mode must be enabled before recording any data for the Coordinated Entry System in HMIS. Guidance for enabling/disabling EDA mode can be found on page 5.

Executing verbal or written Releases of Information (ROI)

See **Fundamentals of CES Data Entry** > Release of Information beginning on page 6.

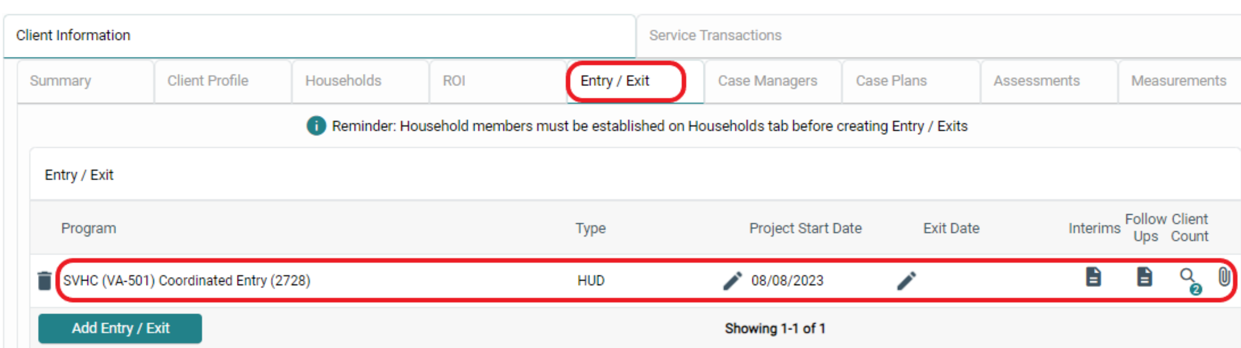
Updating the Coordinated Entry (CE) Project Entry/Exit

When updating the CE Project Entry/Exit, there are several steps that will be completed:

- Complete any missing Universal Data Elements
    - ALL household members
- Record an updated Current Living Situation
    - ALL Adults (persons 18 years or older)
- Record the CE Assessment
    - Head of Household only
- Record the Literal Homeless Assistance Screening
    - Head of Household only
- Record CE Event(s)
    - Head of Household only

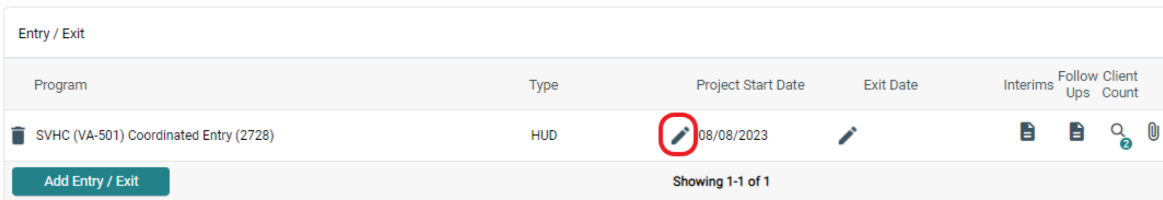
First, locate the CE Project Entry/Exit:

1. Once in the **Client Profile** for the Head of Household, click the **Entry / Exit** tab and locate the CE Entry/Exit record.

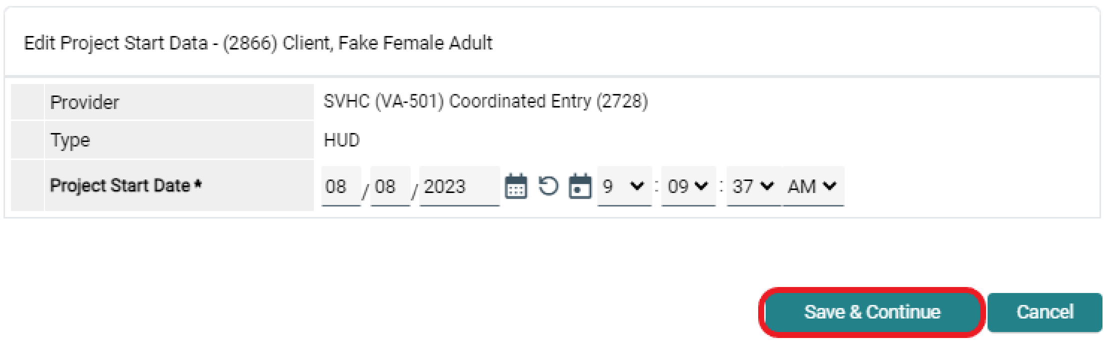


Complete any missing Universal Data Elements:

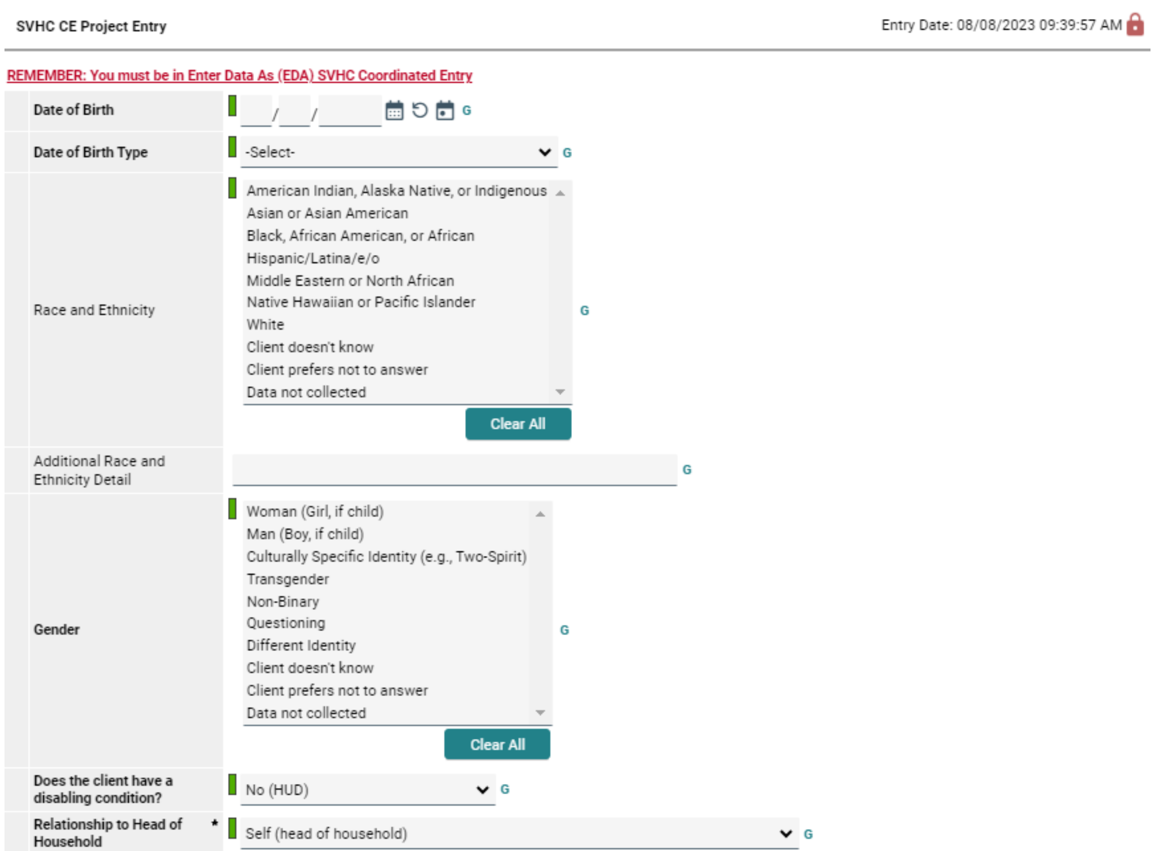
1. Click the pencil icon to the left of the **Project Start Date**.



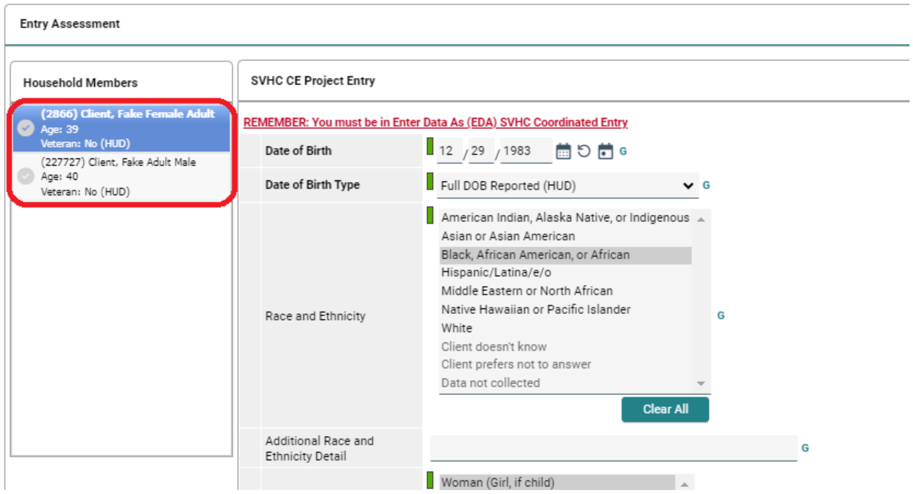
2. Click the "Save and Continue" button at the bottom of the window to continue.



3. Scroll to the **Entry Assessment** section. The Universal Data Elements are the top set of questions. Ensure that these fields are completed; if any are blank, fill them in.

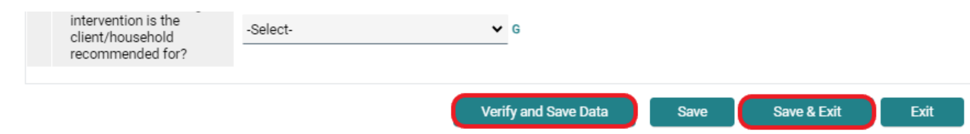


4. This needs to be done for ALL household members. Click on each household member's name in the **Household Members** section on the left to view their individual assessments.



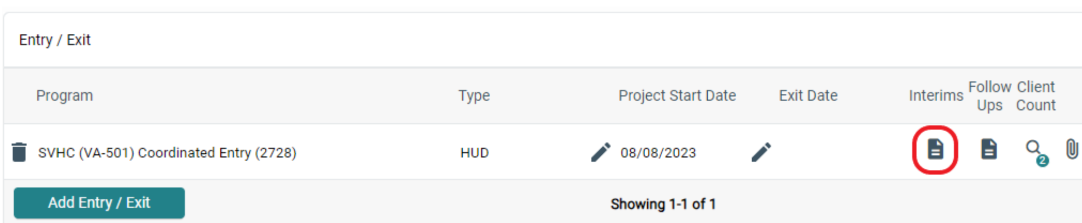
> Helpful Hint: Be sure to click "Save and Verify Data" after completing the assessment for each household member.

5. When you are done checking all Universal Data Elements for each household member, scroll to the bottom of the page and click the "Save and Verify" button (if you haven't already) and then "Save and Exit".

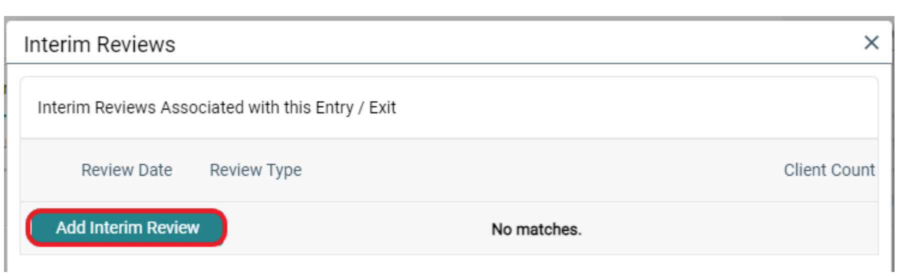


Record an updated Current Living Situation:

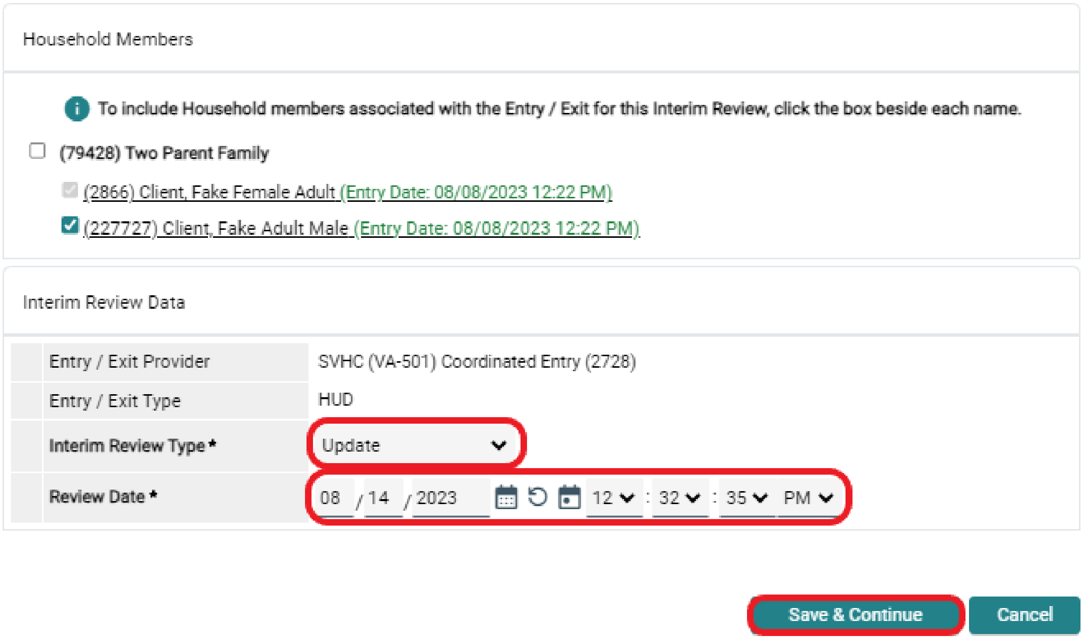
1. Click the icon under the **Interims** label.



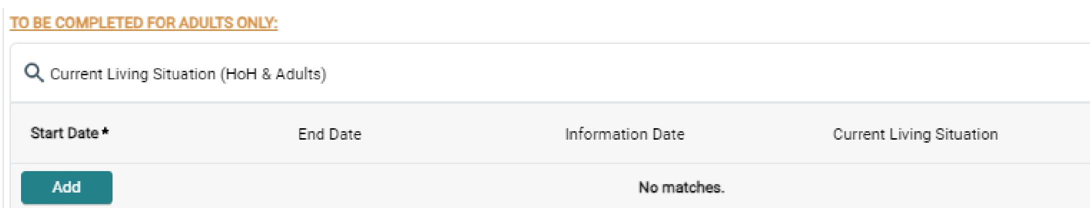
2. Click the "Add Interim Review" button on the window that appears.



In the window that appears select *Update* from the **Interim Review Type** drop-down menu. Use the **Review Date** field to indicate when information was captured. If data entry is done after the fact, back date this field. When complete, click the "Save and Continue" button.



3. Scroll to the **Current Living Situation** section of the **Interim Review Assessment** screen and click the "Add" button. This section will be completed for all Adult household members (persons 18 years or older).

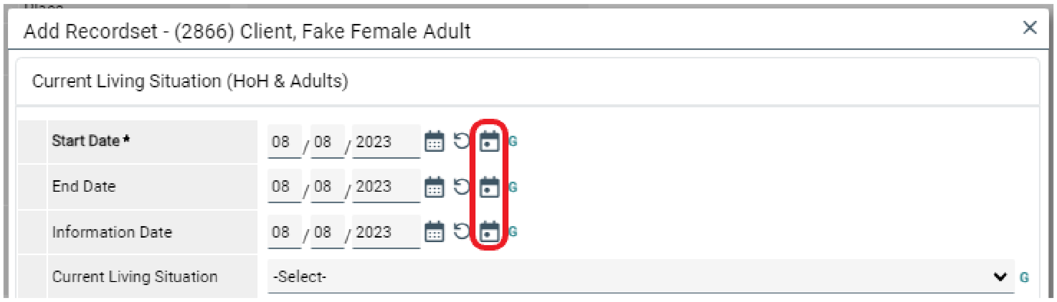


Helpful Hint: There are three reasons to record a current living situation:

- An individual's or household's living situation has changed
- A CE Assessment has taken place (i.e., a VI-SPDAT was completed)
- A CE Event has occurred (i.e., there was an attempt at diversion)
- Every 45 days to indicate the client is active and not a "fall-off"

4. The **Current Living Situation** window will appear.

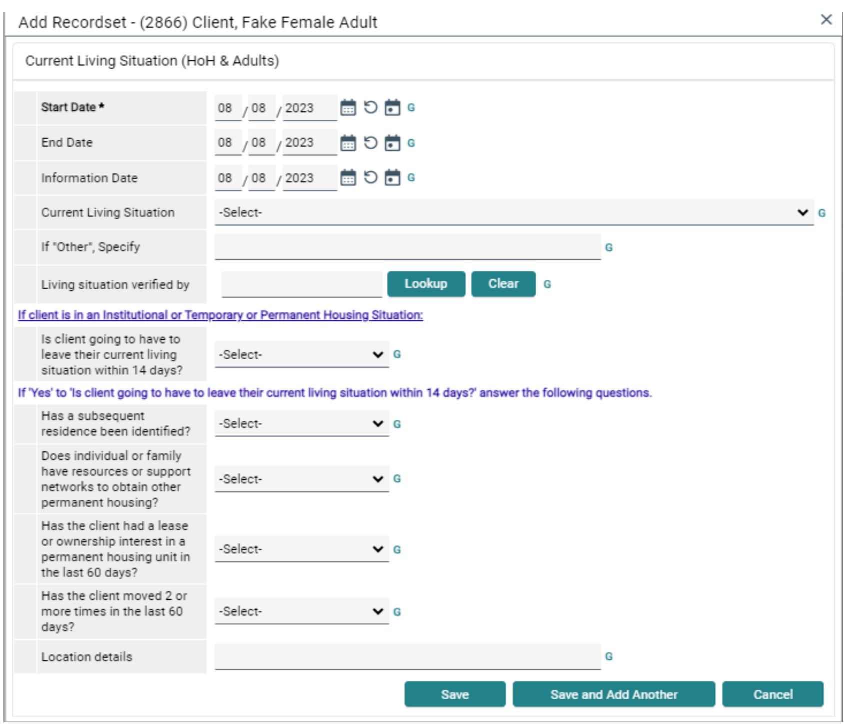
Click the green checkmark/calendar icon to populate the first three fields: **Start Date, End Date, Information Date.** This sets each field to the Interim Review Date as expected.



5. Select an option from the **Current Living Situation** drop-down menu

   a. If something from the HOMELESS SITUATIONS section of the drop-down menu is selected, stop and click the "Save" button at the bottom of the window and skip to step 12 below.

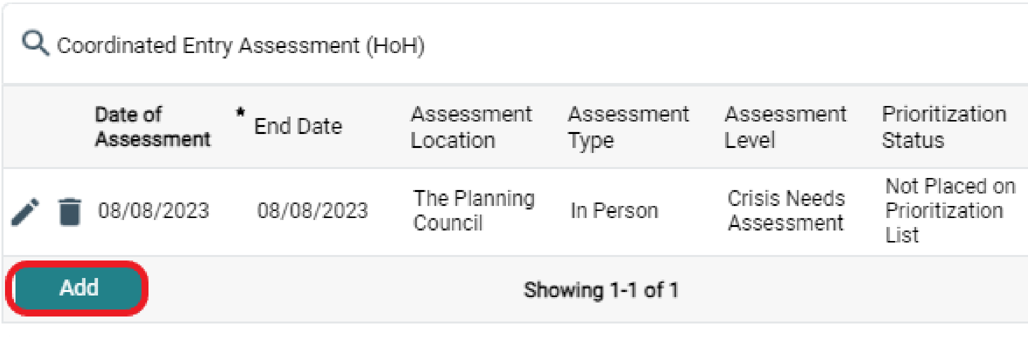
   b. If something from the INSTITUTIONAL or TEMPORARY and PERMANENT HOUSING SITUATIONS section of the drop-down menu is selected, continue answering the additional questions on the form.



Helpful Hint: The **Living situation verified by** field should only be used when recording data on behalf of an agency other than your own. The **Location details** field can be used to provide more information about an individual's living situation location.

Record the CE Assessment:

1. Use the **Coordinated Entry Assessment** section to record that an Assessment Point has conducted a Housing Needs Assessment (VI-SPDAT). Click the "Add" button to bring up the relevant fields.



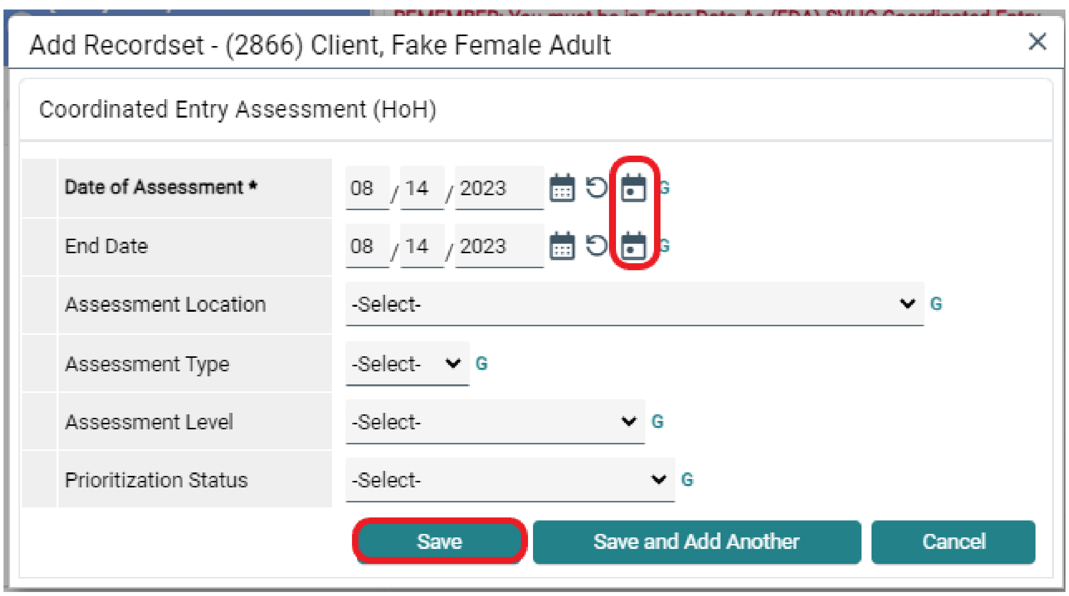
2. The **Coordinated Entry Assessment** window will appear. Click the green checkmark/calendar icon to populate the first two fields: **Date of Assessment** and **End Date**

   Fill in the **Assessment Location** and **Assessment Type.**

   Select *Housing Needs Assessment* for the **Assessment Level** field.

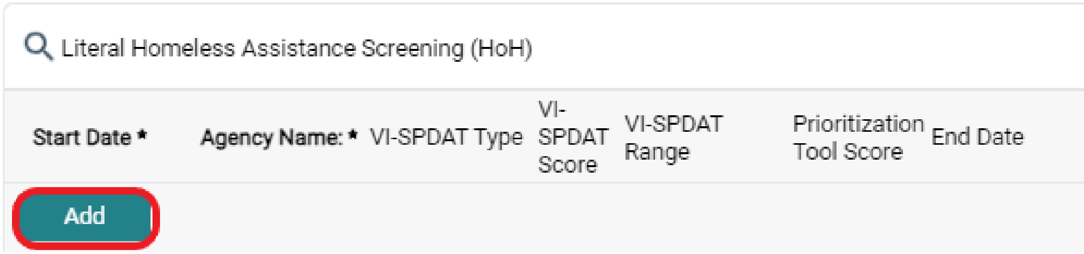
   Select *Placed on Prioritization List* for the **Prioritization Status** field.

   Finally, click the "Save" button.



Record the Literal Homeless Assistance Screening:

1. Locate the **Homeless Assistance Screening** section to record the results of the VI-SPDAT and Prioritization Tool. Click on the "Add" button to open the data entry window.



2. The **Start Date** will prepopulate as expected.

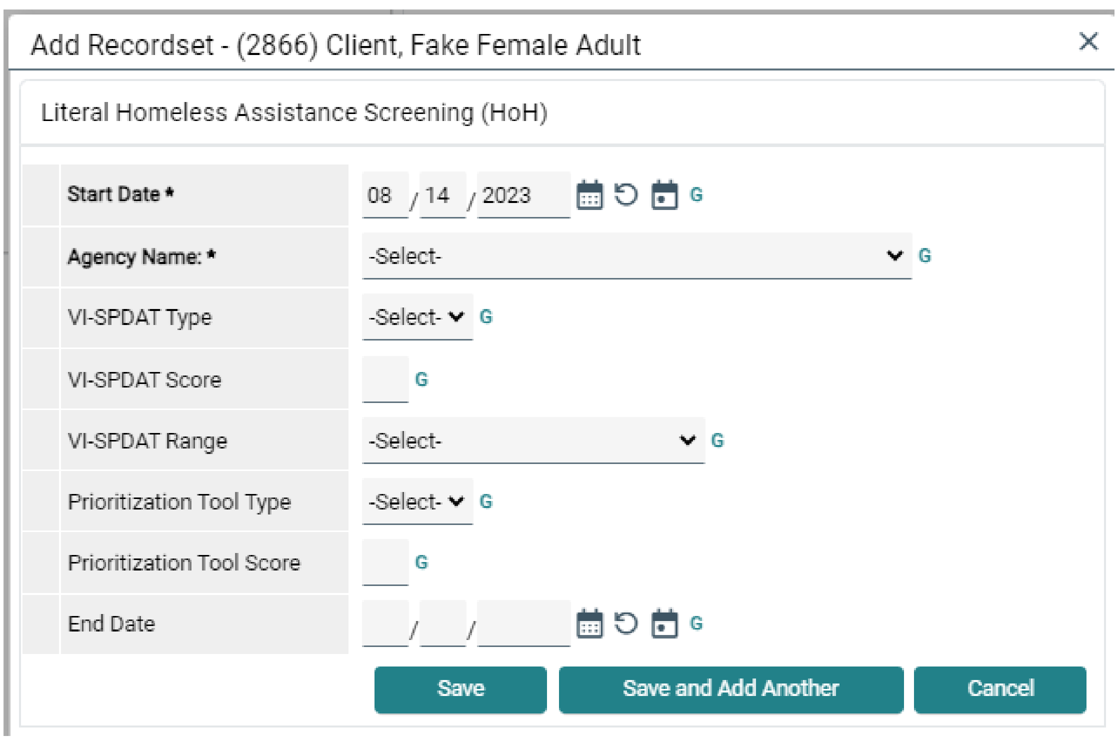
   Continue to the VI-SPDAT information.

   Fill in the **VI-SPDAT Type, VI-SPDAT Score,** and **VI-SPDAT Range.**

   If your CoC utilizes a Prioritization Tool, fill in the **Prioritization Tool Type** and **Prioritization Tool Score.** If your CoC does not use this tool, leave these fields blank.

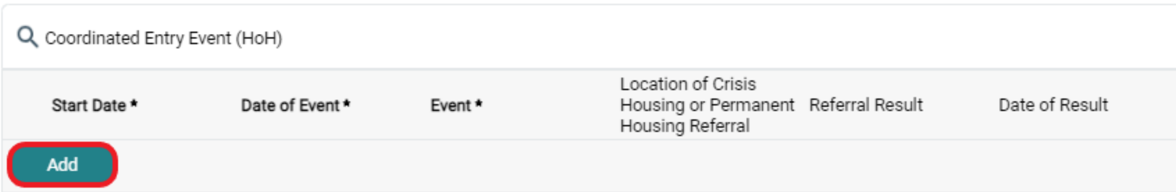
   Fill in the **Agency Name** field.

   Finally click the "Save" button.



Record CE Event(s):

1. Use the **Coordinated Entry Event** section to record that an Assessment Point has attempted Diversion, and to record any referrals that are made. Click the “Add” button.



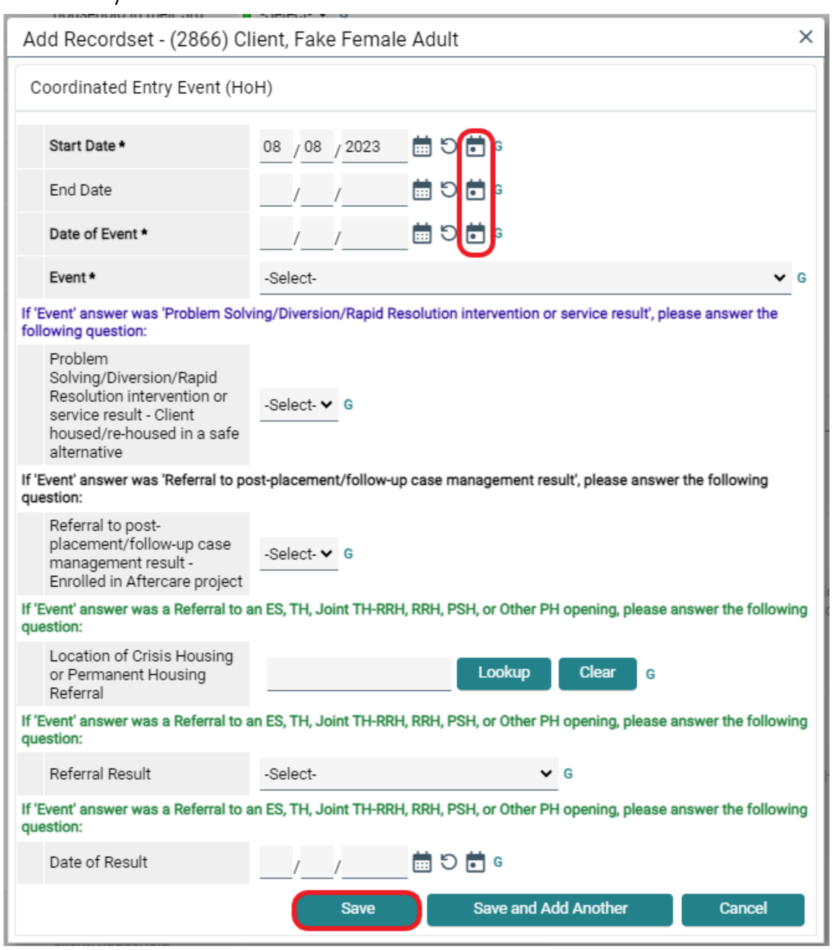
> Helpful Hint: Everyone should have at a minimum one CE Event for Diversion. This is recorded as *Problem Solving/Diversion/Rapid Resolution intervention or service* in the drop-down menu.

2. The **Coordinated Entry Event** window will appear. Click the Green checkmark/calendar icon to populate the first three fields: **Start Date, End Date,** and **Date of Event.**

   Fill in the **Event** field. This selection will determine which of the following questions you should complete.

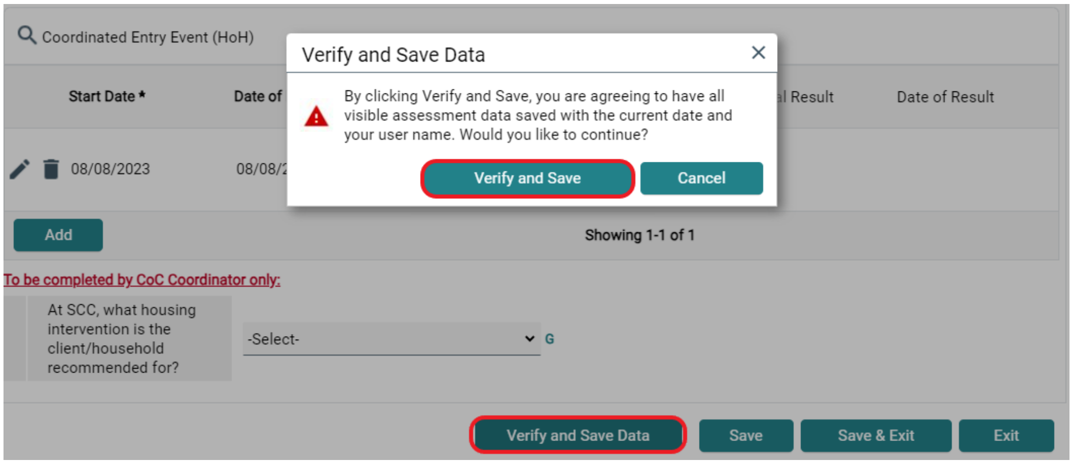
   Read each of the next questions carefully to determine if it is relevant. If so, complete the associated data entry.

   Finally click the “Save” or “Save and Add Another” button.



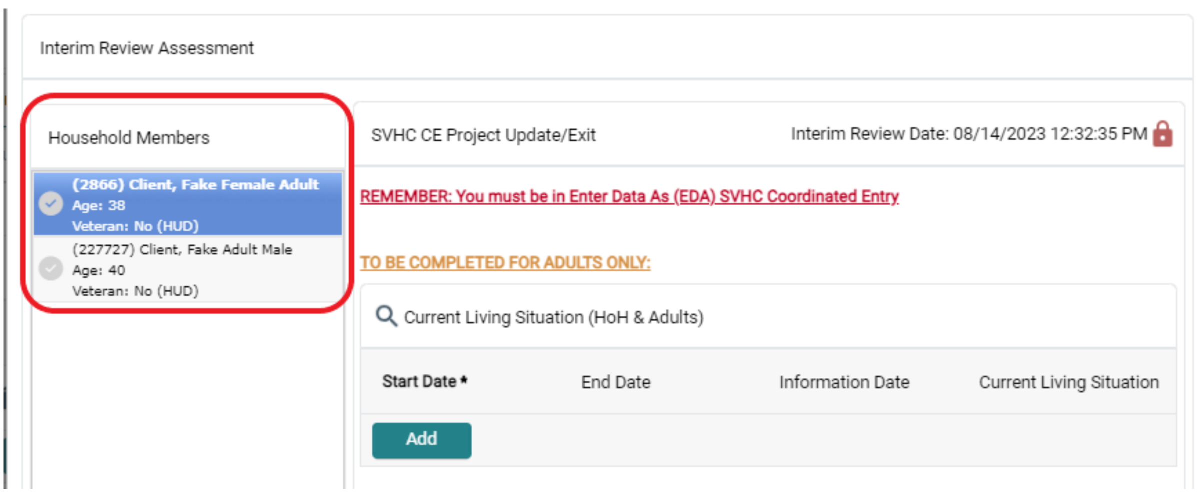
> Helpful Hint: If the **CE Event** was Diversion and *Yes* was selected for the follow up question, the indication is that the individual or household was successfully diverted away from homelessness. This means the client or individual should be immediately exited from the CE Project.

3. Once all Coordinated Entry Events have been added, click the "Verify and Save Data" button at the bottom of the screen. A pop-up will appear. Click "Verify and Save Data" again.



Repeat applicable steps for all additional household members:

1. Scroll back to the top of the **Interim Review Assessment** window and complete the Current Living Situation for each additional Adult household member by selecting their name in the **Household Members** section.

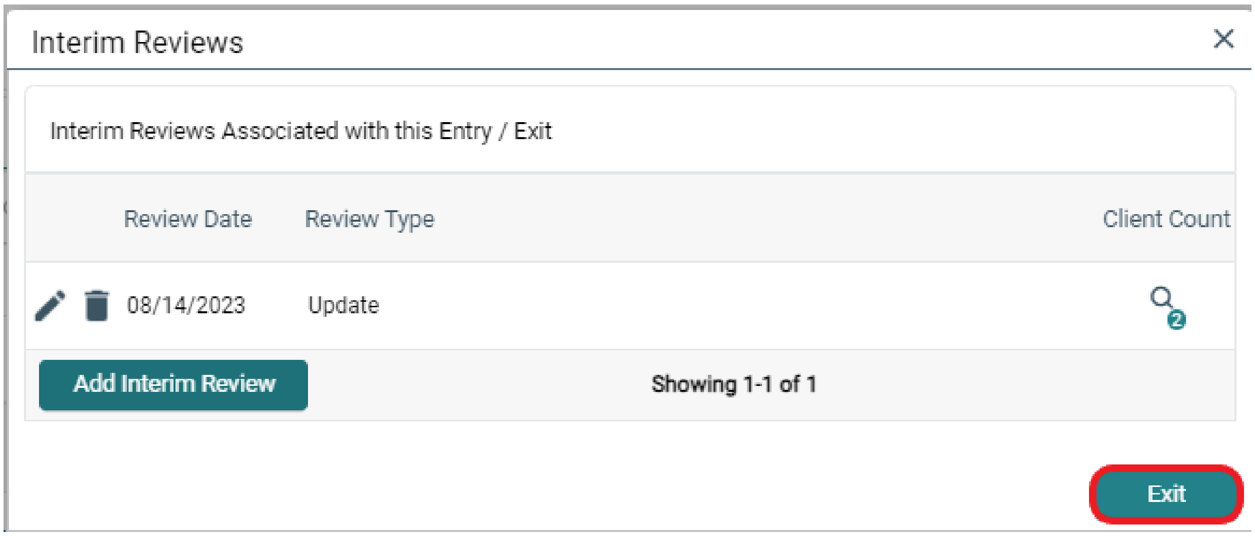


> Helpful Hint: The Current Living Situation needs to be recorded for every Adult household member (persons 18 years and older).
>
> Be sure to click "Verify and Save Data" after completing the assessment for each household member.

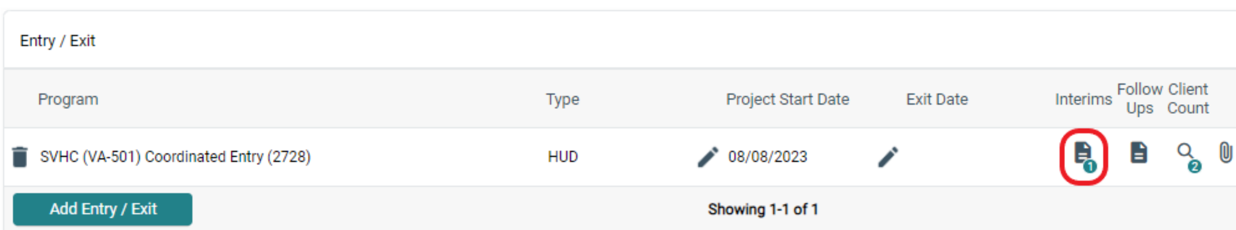
When you are finished recording information for each household member, click the “Save and Exit” button on the bottom right-hand side of the screen.

This will return you to the **Interim Reviews** window.

2. Click the “Exit” button to close the window



3. You should now see the **Entry/Exit** tab. The CE Project Entry/Exit record should now show a blue circle in the **Interim** column giving a count of interims that have been recorded.

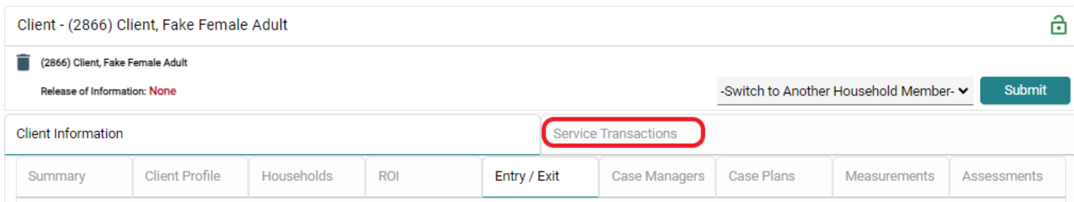


If the client or household is successfully diverted, the CE Project Exit should be completed. Guidance on completing a CE Project Exit can be found in the **Recording CE Project Exit** section on page 39.

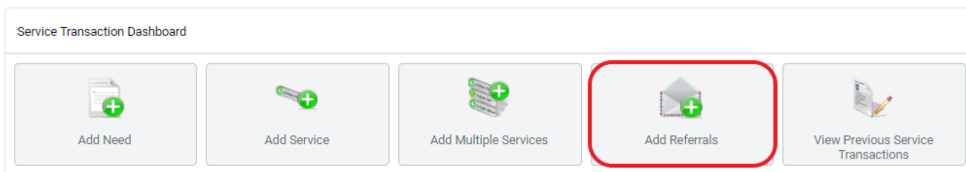
Sending Referrals

When a Coordinated Entry Event is recorded, indicating that a referral has been made, it is important to create the Referral Service Transaction. This is the action in HMIS that sends a notice to the agency receiving the referral. Without it, the intended agency is unaware of the referral.

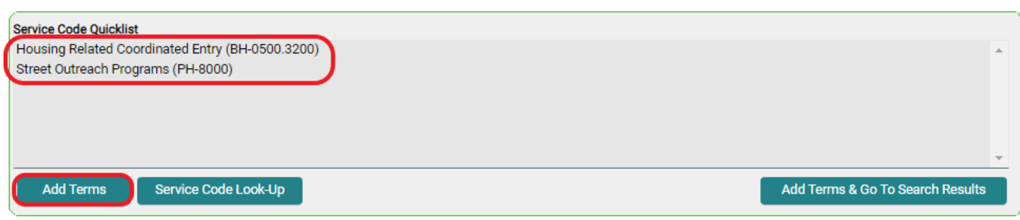
1. In the **Client Profile**, select the **Service Transactions** tab.



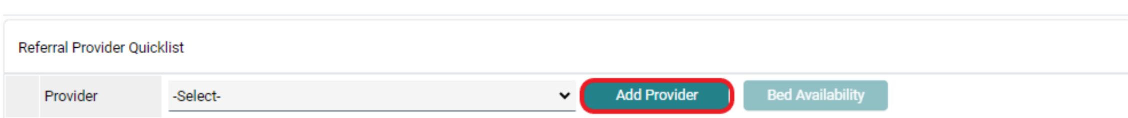
2. Then click "Add Referrals" from the **Service Transaction Dashboard**.



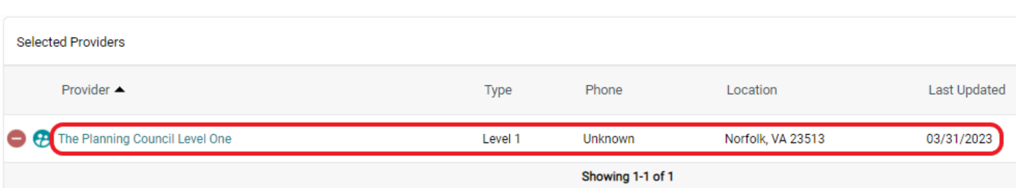
3. The window that appears begins with a **Household Members** section. Skip that section and continue to the **Needs Assignment** area. Locate the **Service Code Quicklist**.
    a. If referring to Street Outreach, Select the Street Outreach Programs Option and click the "Add Terms" button.
    b. If referring someone to an Assessment Point, select Housing Related Coordinated Entry and click the "Add Terms" button.



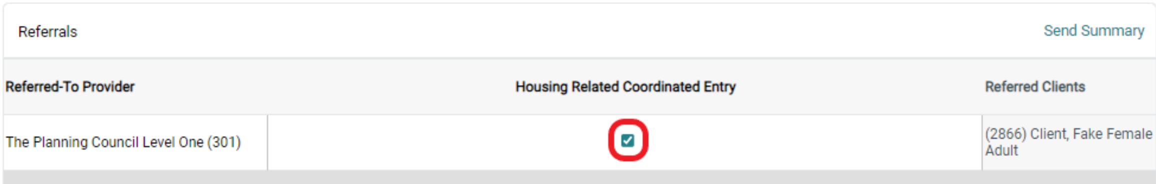
4. Continue to the **Referral Provider Quicklist** section, choose the agency the client will be referred to from the drop-down menu, and click the "Add Provider" button.



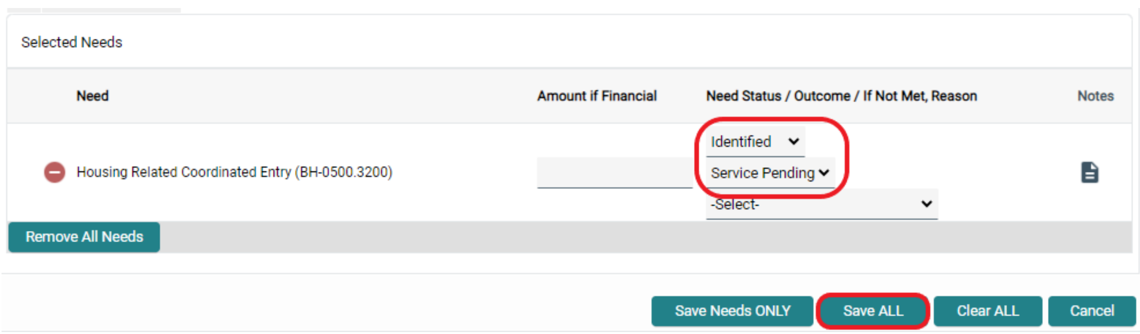
5. When successfully selected, the provider's information will appear in the next section, **Selected Providers**.



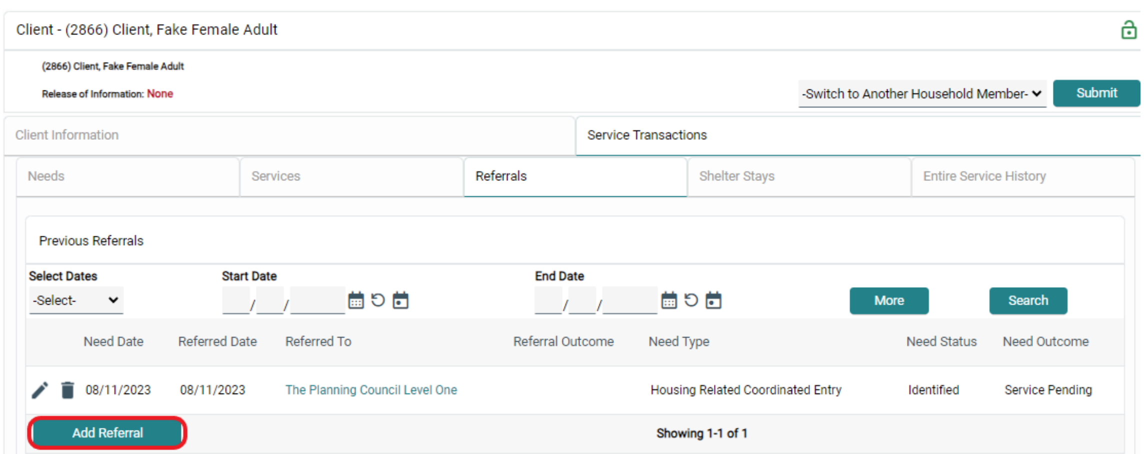
6. Scroll past the **Referral Data** section (it has prepopulated the date already) to find the **Referrals** section. Review the referral and confirm by clicking the checkbox. Note: if this step is missed the referral will not send.



7. Scroll to the final section, **Selected Needs**, and ensure the **Need Status** defaulted to *Identified*. Then select *Service Pending* for **Outcome** and click the "Save ALL" button.



8. The screen will now show the **Service Transactions > Referrals** tab, reflecting the referral has been entered. If additional referrals need to be added, click the "Add Referral" button and repeat these steps.



Housing Providers

This section will outline HMIS responsibilities for Housing Providers. These responsibilities include:

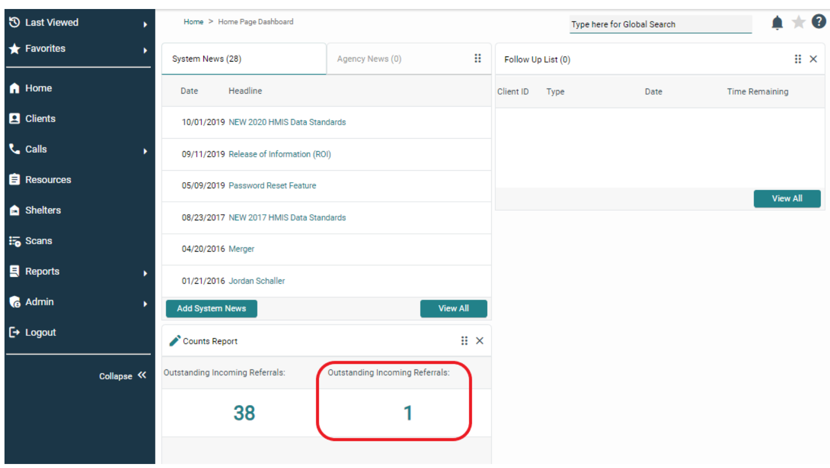
- Answering Referrals
- Updating the Coordinated Entry (CE) Project Entry/Exit
    - Recording information about Attempting Diversion
- Recording CE Project Exit

REMEMBER: Enter Data As (EDA) mode must be enabled before recording any data for the Coordinated Entry System in HMIS. Guidance for enabling/disabling EDA mode can be found on page 5.

Answering Referrals

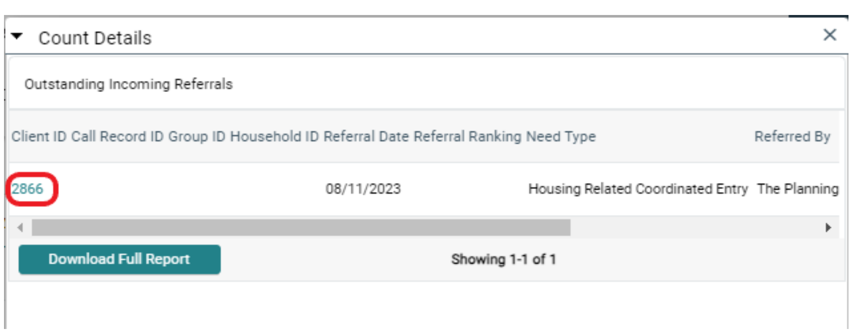
When a referral is received from the Coordinated Entry System, it is very important to record the Referral Outcome and other associated data in the Referral Service Transaction.

1. Check the Home Page Dashboard in HMIS to make sure you have a **Counts Report** for *Outstanding Incoming Referrals* as shown in the image below. Once you have located the **Counts Report**, click on the teal hyperlinked number.

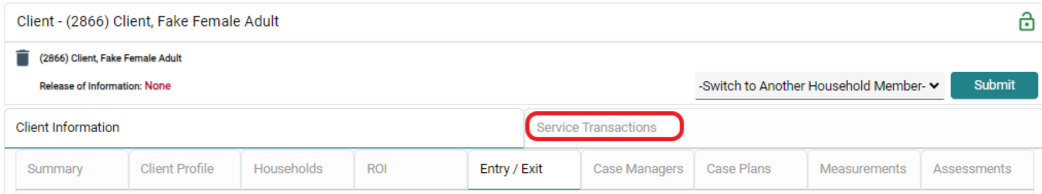


> Helpful Hint: If you do not have a **Counts Report** for *Outstanding Incoming Referrals* appearing on your Home Page Dashboard, contact your System Administrator.

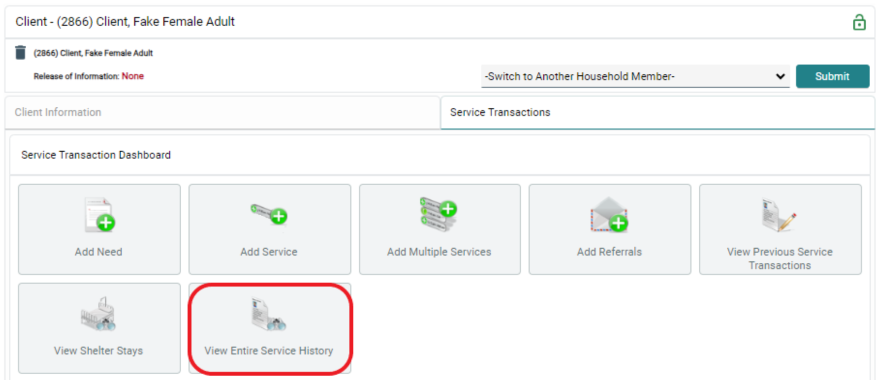
2. After the **Count Details** window opens, click on the **Client ID** – this will take you to the client's profile.



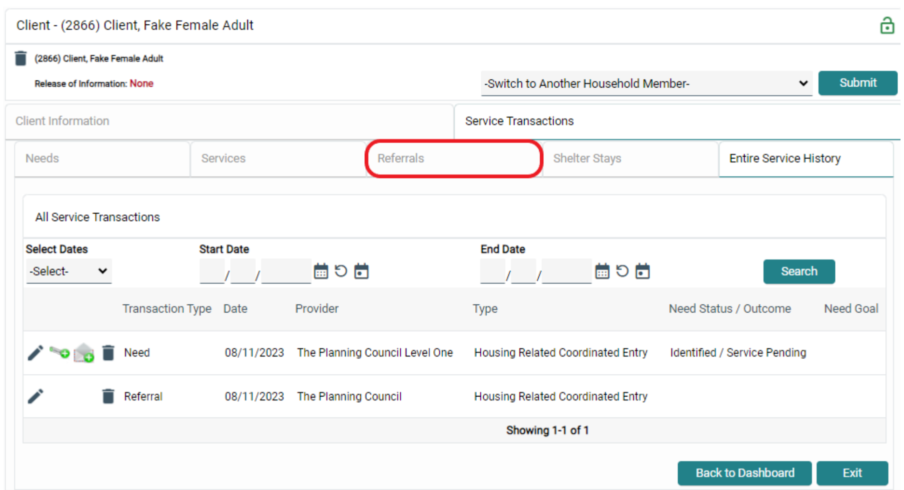
3. Click on the **Service Transactions** tab.



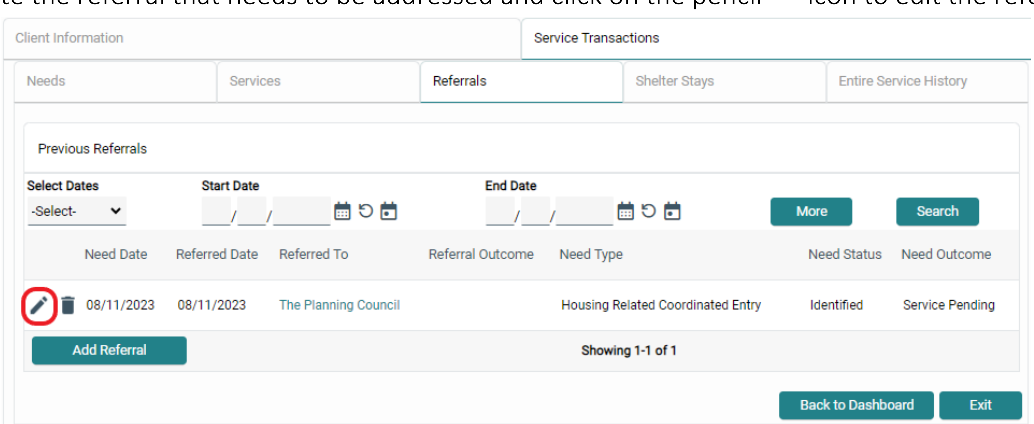
4. Click the **View Entire Search History** button.



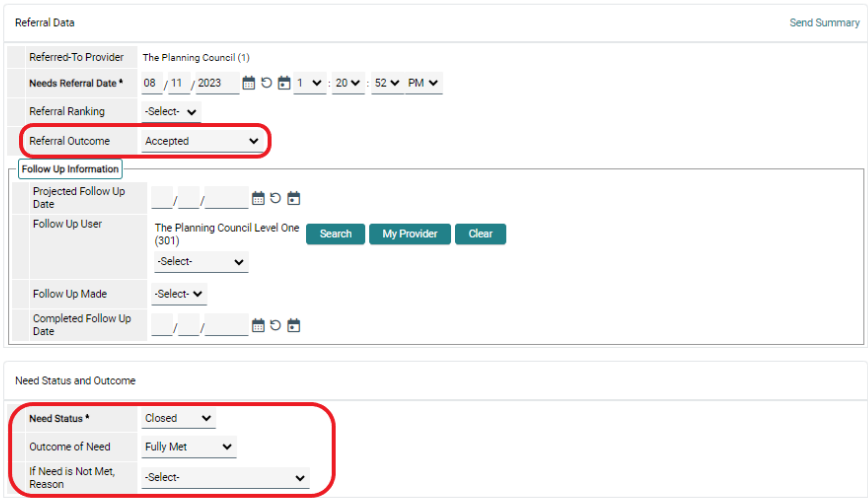
5. Click on the **Referrals** tab.



6. Locate the referral that needs to be addressed and click on the pencil icon to edit the referral.



7. Complete the areas circled in red in the image below (note: additional fields may appear based on responses provided). Then click “Save and Exit” on the bottom right-hand side of the screen.



Helpful Hint: Refer to the *Coordinated Assessment Referrals Outcome* document for guidance on completing these fields.

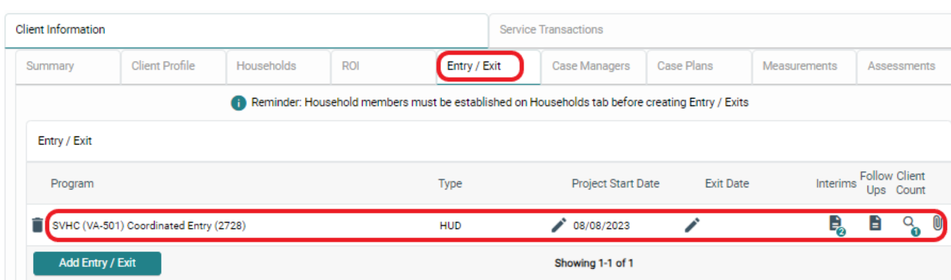
Updating the Coordinated Entry (CE) Project Entry/Exit

When updating the CE Project Entry/Exit, there are several steps that will be completed:

- Complete any missing Universal Data Elements
  - ALL household members
- Record an updated Current Living Situation
  - All Adults (persons 18 years or older)
- Update/Record CE Event(s)
  - Head of Household only

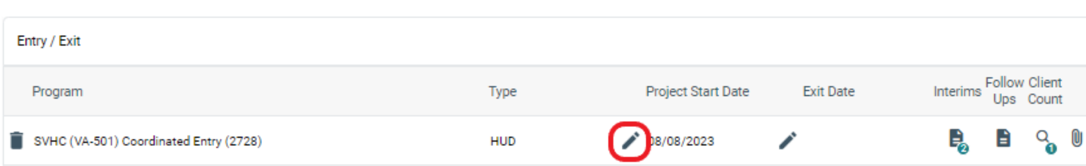
First, locate the CE Project Entry/Exit:

1. Once in the **Client Profile** for the Head of Household, click the **Entry / Exit** tab and locate the CE Entry/Exit record.

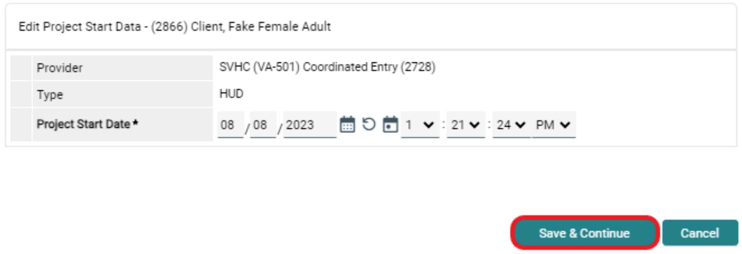


Complete any missing Universal Data Elements:

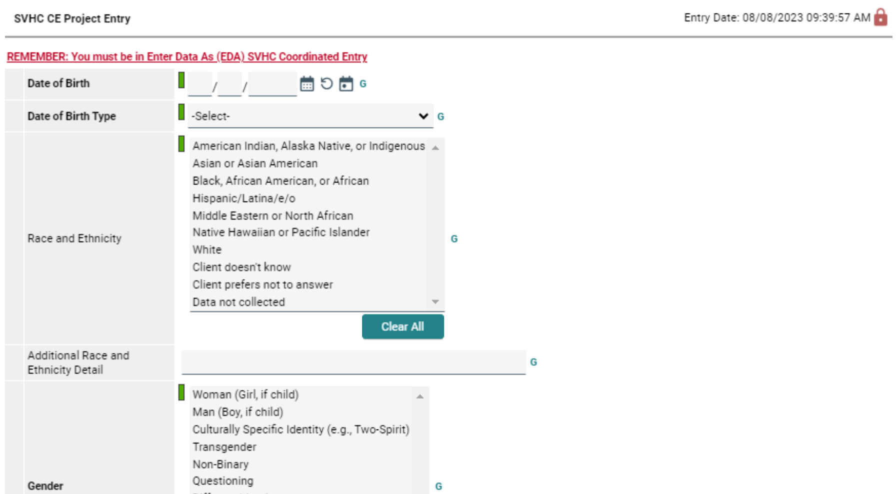
1. Click the pencil icon to the left of the **Project Start Date.**



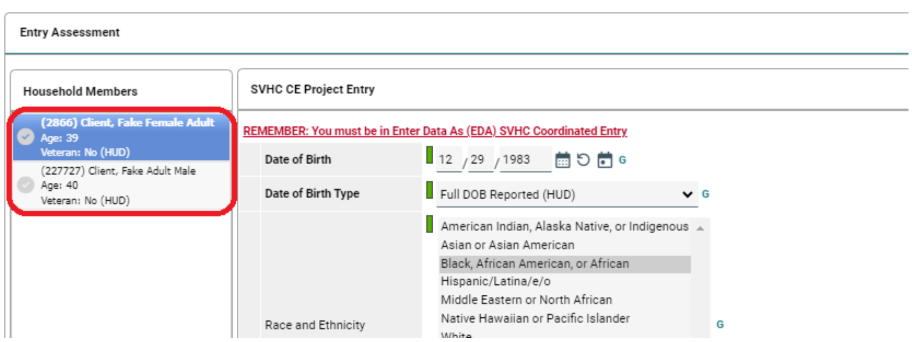
2. Click the "Save and Continue" button at the bottom of the window to continue.



3. Scroll to the **Entry Assessment** section. The Universal Data Elements are the top set of questions. Ensure that these fields are completed; if any are blank, fill them in.



4. This needs to be done for ALL household members. Click on each household member's name in the **Household Members** section on the left to view their individual assessments.

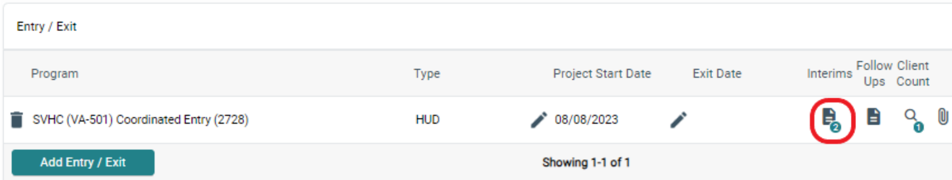


Helpful Hint: Be sure to click "Save and Verify Data" after completing the assessment for each household member.

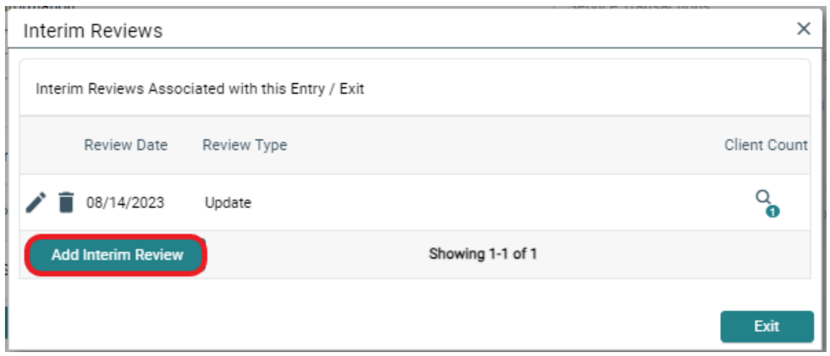
5. When you are done checking all Universal Data Elements for each household member, scroll to the bottom of the page and click the "Save and Verify" button (if you haven't already) and then "Save and Exit".

Record an updated Current Living Situation:

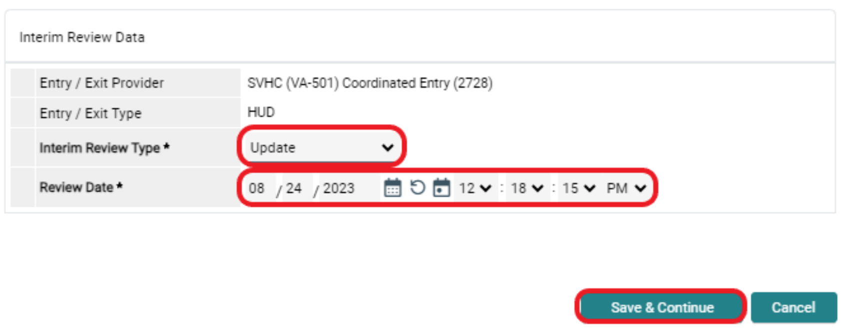
1. Click the icon under the **Interims** label.



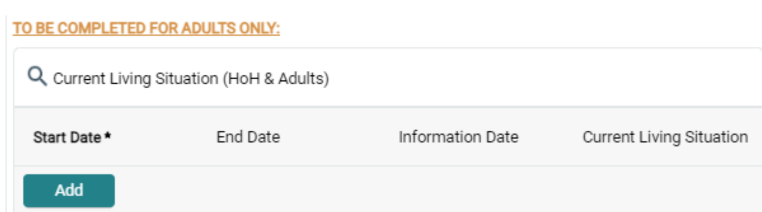
2. Click the "Add Interim Review" button on the window that appears.



3. In the window that appears, select *Update* from the **Interim Review Type** drop-down menu. Use the **Review Date** field to indicate when information was captured. If data entry is done after the fact, back date this field. When complete, click the "Save and Continue" button.



4. Scroll to the **Current Living Situation** section of the **Interim Review Assessment** screen and click the "Add" button. This section will be completed for All Adult household members (persons 18 years or older).

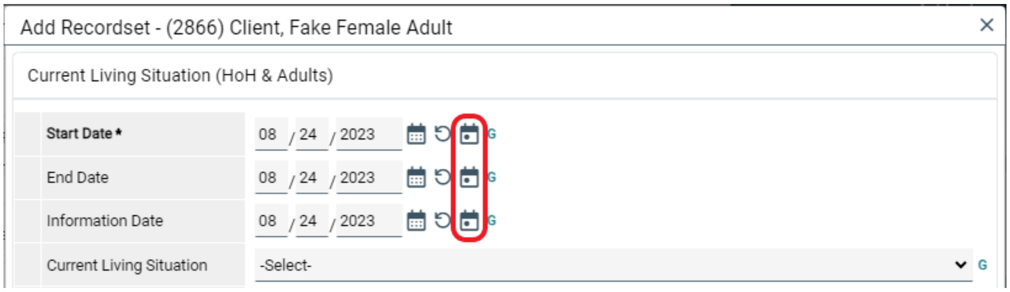


Helpful Hint: There are three reasons to record a current living situation:

- An individual's or household's living situation has changed
- A CE Assessment has taken place (i.e., a VI-SPDAT was completed)
- A CE Event has occurred (i.e., there was an attempt at diversion)
- Every 45 days to indicate the client is active and not a "fall-off"

5. The **Current Living Situation** window will appear.

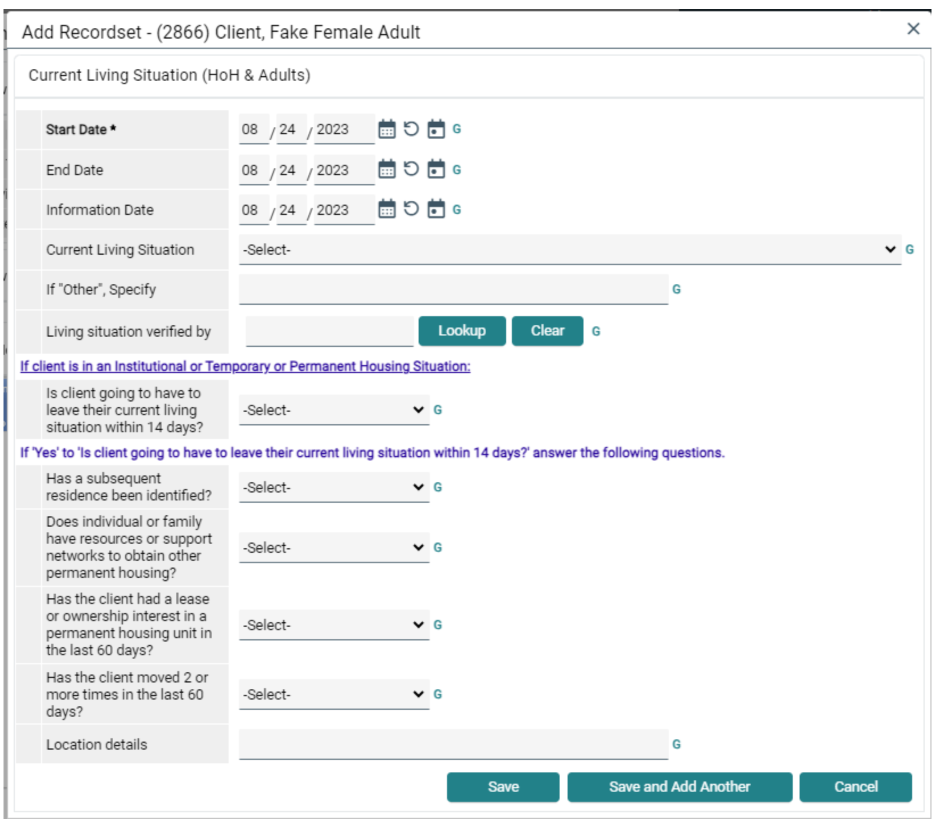
Click the calendar icon to populate the first three fields: **Start Date, End Date, Information Date.** This sets each field to the Interim Review Date as expected.



6. Select an option from the **Current Living Situation** drop-down menu.

   a. If something from the HOMELESS SITUATIONS section of the drop-down menu is selected, stop and click the "Save" button at the bottom of the window and skip to step 12 below.

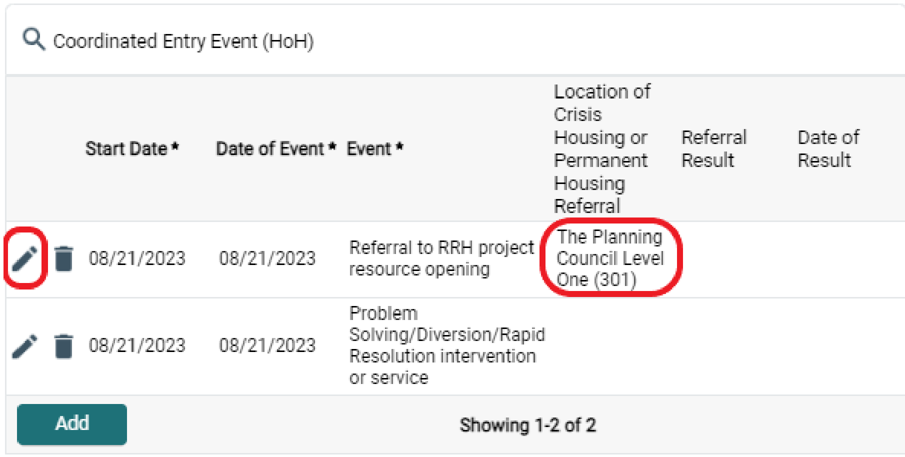
   b. If something from the INSTITUTIONAL or TEMPORARY and PERMANENT HOUSING SITUATIONS section of the drop-down menu is selected, continue answering the additional questions on the form.



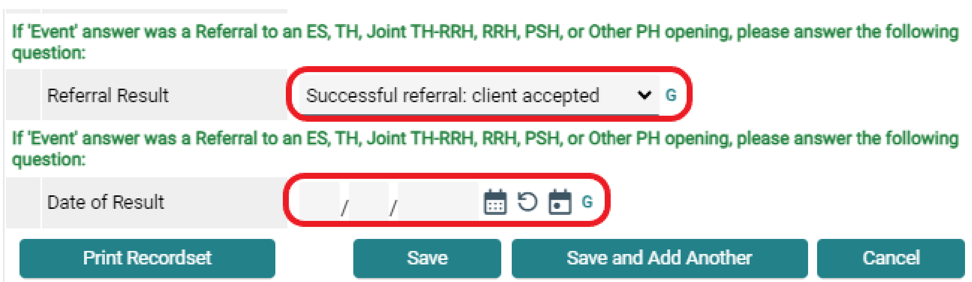
Helpful Hint: The **Living situation verified by** field should only be used when recording data on behalf of an agency other than your own. The **Location details** field can be used to provide more information about an individual's living situation location.

Update/Record CE Event(s):

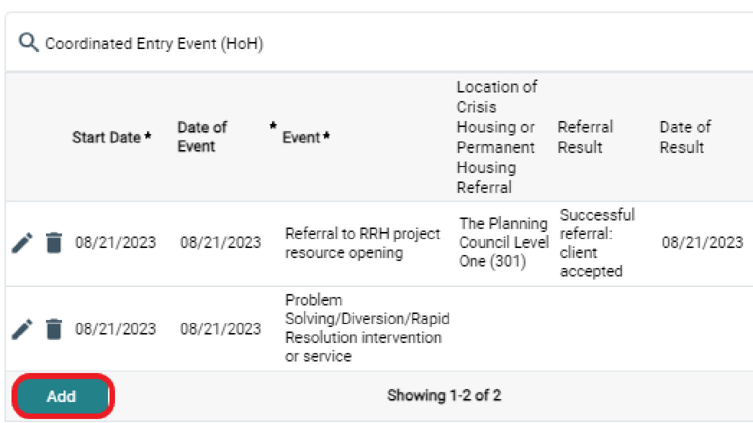
1. Scroll to the final section, **Coordinated Entry Event**. This section will be used to review referrals that have been received. Scan the fourth column, **Location of Crisis Housing or Permanent Housing Referral** to find the name of the project you represent and click the pencil icon to update the Event.



2. Once open, the bottom two fields need to be updated: **Referral Result** and **Date of Referral.** Click the "Save" button when complete.



3. Continue to use the **Coordinated Entry Event** section to record that a Housing Provider has attempted Diversion. Click the "Add" button.



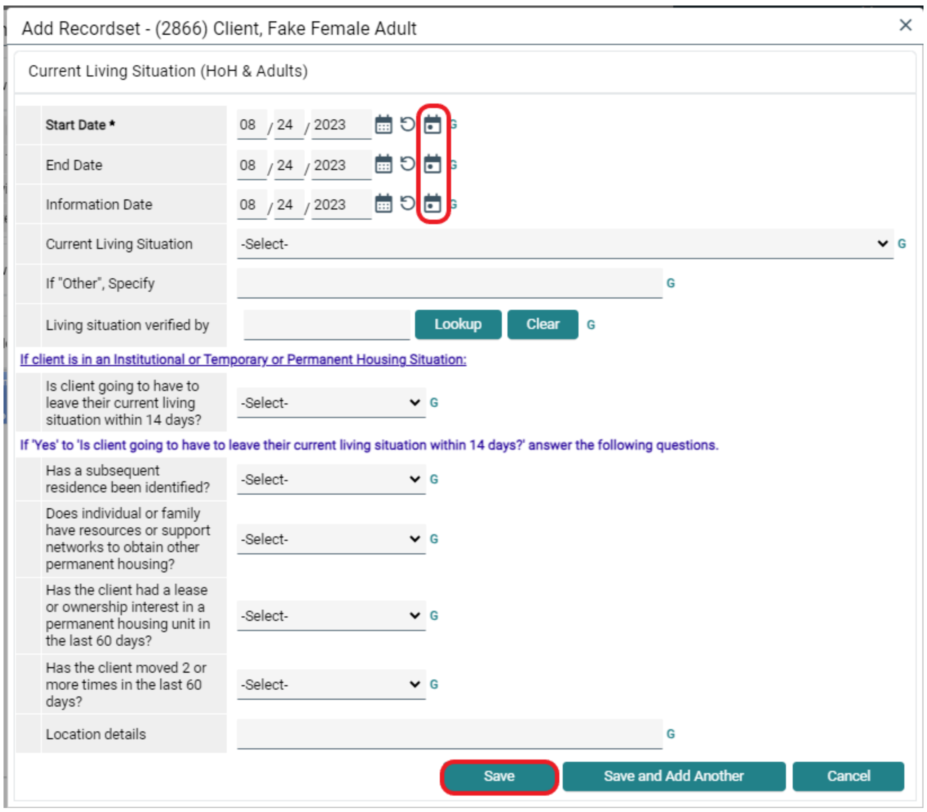
Helpful Hint: Diversion is recorded as *Problem Solving/Diversion/Rapid Resolution Intervention or service* in the drop-down menu.

4. The **Coordinated Entry Event** window will appear. Click the Green checkmark/calendar icon to populate the first three fields: **Start Date, End Date,** and **Date of Event.**

   Fill in the **Event** field. This selection will determine which of the following questions you should complete.

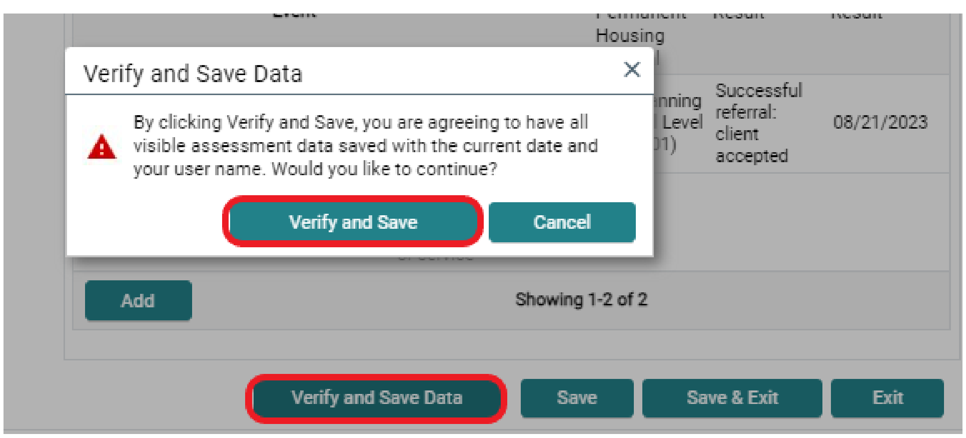
   Read each of the next questions carefully to determine if it is relevant. If so, complete the associated data entry.

   Finally click the "Save" or "Save and Add Another" button.



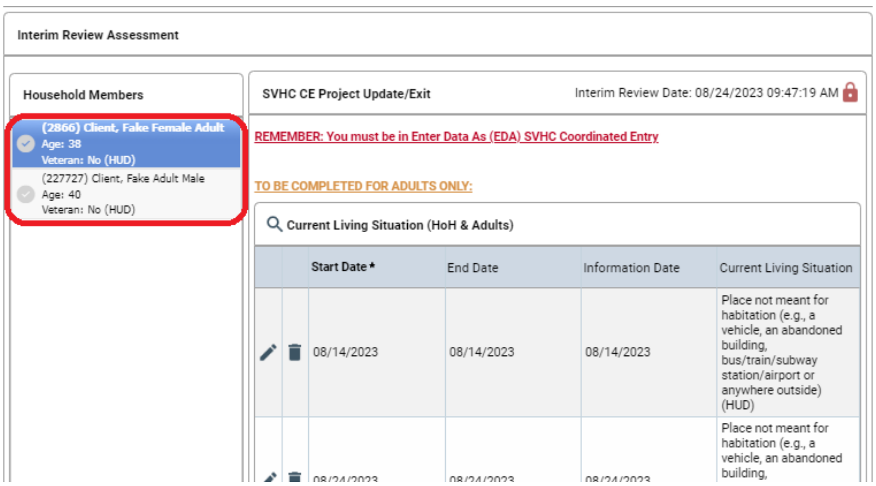
Helpful Hint: If the **CE Event** was Diversion and *Yes* was selected for the follow up question, the indication is that the individual or household was successfully diverted away from homelessness. This means the client or individual should be immediately exited from the CE Project.

5. Once all Coordinated Entry Events have been updated/added, click the "Verify and Save Data" button at the bottom of the screen. A pop-up will appear. Click "Verify and Save Data" again.



Repeat applicable steps for all additional household members:

1. Scroll back to the top of the **Interim Review Assessment** window and complete the Current Living Situation for each additional Adult household member by selecting their name in the **Household Members** section.

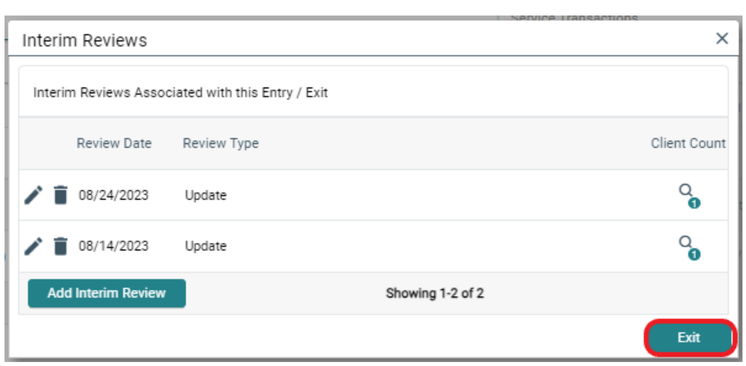


> Helpful Hint: Be sure to click “Save and Verify Data” after completing the assessment for each household member.

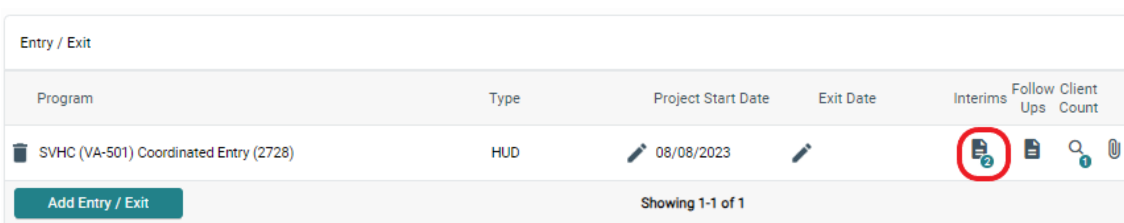
2. When you are finished recording information for each household member, click the “Save and Exit” button on the bottom right-hand side of the screen.

   This will return you to the **Interim Reviews** window.

3. Click the “Exit” button to close the window



4. You should now see the **Entry / Exit** tab. The CE Project Entry/Exit record should now show a blue circle in the **Interim** column giving a count of interims that have been recorded.

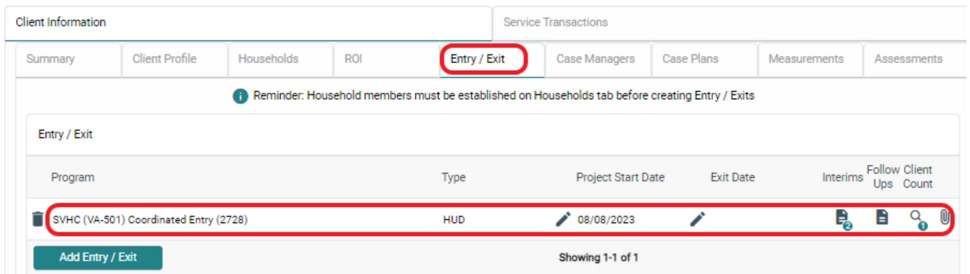


Recording CE Project Exit

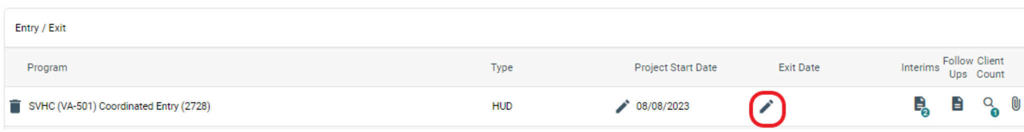
When an individual moves into a housing unit/bed, they should be Exited from the Coordinated Entry Project. The Housing Provider is responsible for completing the project exit upon Housing Move-In.

First, locate the CE Project Entry/Exit:

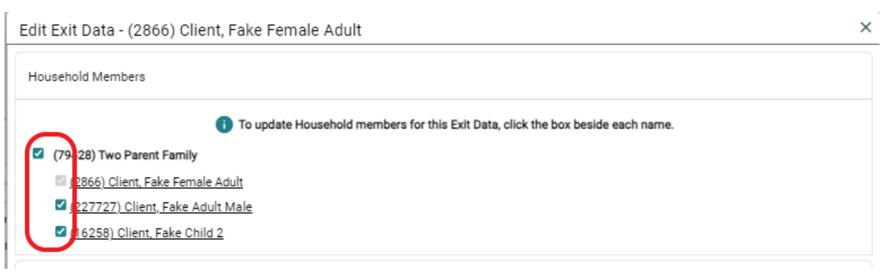
1. Once in the **Client Profile** for the Head of Household, click the **Entry / Exit** tab and locate the CE Entry/Exit record.



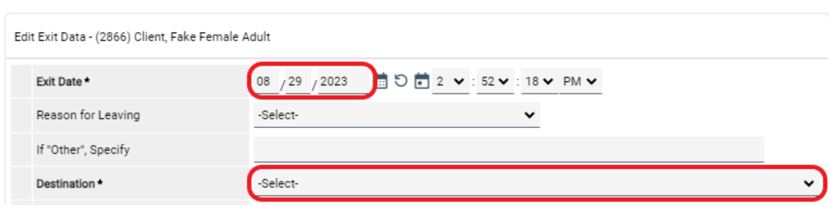
2. Click the pencil icon next to the empty **Exit Date** field.



3. The **Edit Exit Data** window will appear. In the **Household Members** section at the top, make sure each family member that has been housed with the project is selected.



4. Next, ensure the **Exit Date** reflects the day the client/household moved into the housing unit and select the proper **Destination**. Then, click the "Save and Continue" button.



5. The **Entry / Exit Data** window will open allowing an update to any data before completing the exit process. Once complete, scroll to the bottom of the page and click the "Save and Verify" button and then "Save and Exit".