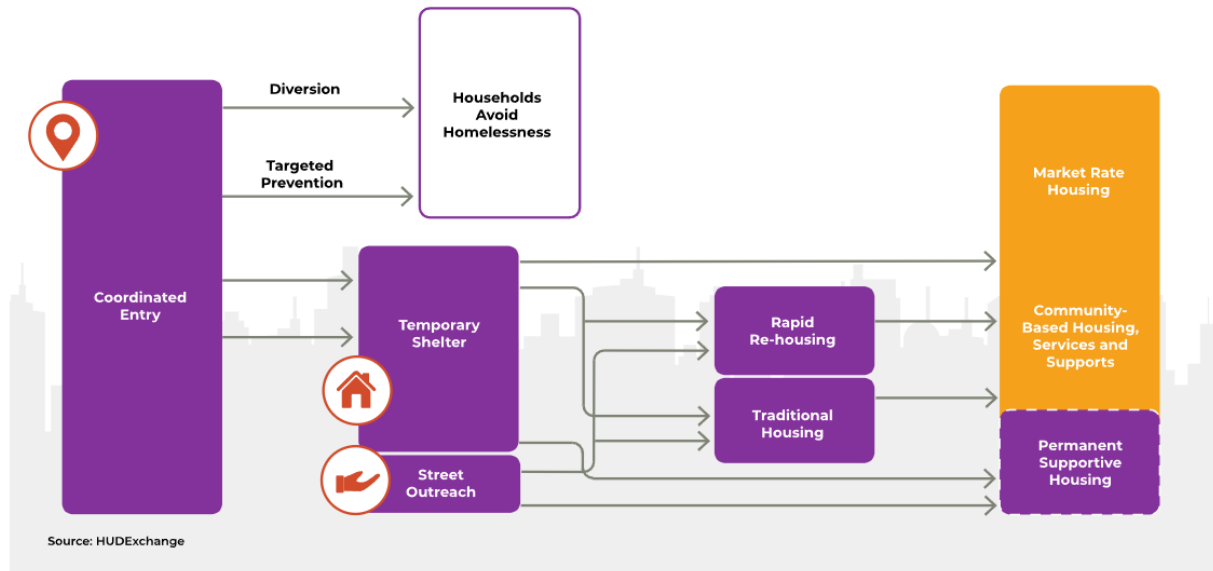


TX-625 Lubbock County & City CoC Coordinated Entry Data Entry Manual



There are four distinct components to an effective referral process:

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Referrals to Coordinated Entry from any agency using the ECHO Database

All referrals for housing should be made to the **West TX CoC - Coordinated Entry** project in the ECHO Database/HMIS. To send a referral within the system, a valid ROI must be on file within the database and/or the ROI must be validated in the database by the entering agency. If a client declines an ROI, please contact the ECHO West Texas Coordinated Entry Team. A referral made through the Database cannot be made for any service, including Coordinated Entry, without a valid ROI uploaded to the database and validated by the referring agency. Refer to the Database Manual for more ROI & Client Privacy/Rights guidance.

Prior to referral or enrollment in Coordinated entry, **Diversion** attempts should be made to avoid a person entering homelessness or to provide assistance in allowing someone to quickly obtain shelter. Questions such as, “Do you have any family or friends you can stay with?” are critical at the first stages of engagement. Diversion also includes rapid assistance such as rental assistance and other creative solutions to get an individual or family to a housed state.

Prevention measures should be taken in the event someone is currently housed but is still facing a housing crisis. This includes more creative solutions to keep an individual or family in stable housing such as rental arrear assistance, utility assistance, job services, etc.

In the event such rapid response measures fail to help someone achieve or retain stable housing, they should be referred to, and enrolled in, the Coordinated Entry project within the ECHO Database. This is a shared project which allows CE Access Points to operate with the same

IMPORTANT: Referrals to emergency shelter and any other emergency needs, such as domestic violence shelter, food, water, etc., should be made directly to those providers and should be made before, or in addition to, a referral to the Coordinated Entry Project

1. Access the client record
 - a. If client does not exist, create a new client

Client - (23) Burnham, Michael 									
(23) Burnham, Michael					Date: 01/01/2025 12:00:00 AM				
Release of Information: Ends 11/06/2031									
Client Information					Service Transactions				
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Measurements	Activities	Assessments

2. Fill out as much information as possible on the client profile tab
 - a. Ensure there is contact information
 - i. **If client does not have phone or email**, please make note (in the “*client notes*” section of the client profile tab, **not case notes** as case notes are



not shared) of where outreach can find client when housing or other assistance is available to them

- ii. **Note:** case notes and incidents are not shared across the platform regardless of the ROI status

Emergency Contacts

Contact's Name	Phone Number	Second Phone Number	Relationship to Client
Add			
Client Email Address	G		
Client Cell Phone Number	G		
Cancel			

Client Notes

Provider	Note Date	Note Preview	Full Note
Add New Client Note Print No matches.			

3. Click the ROI tab

Release of Information: **None**

Client Information

Summary	Client Profile	Households	ROI
---------	----------------	------------	------------

- a. **Note:** an ROI is required to make referrals within the system. If a client does **not want to fill out an ROI**, they should be instructed to call or go to a physical Coordinated Entry access point. A refusal to sign an ROI cannot bar anyone from receiving services. It is only needed to share information with other agencies through the database.
- b. If there is no ROI in the record
 - i. Offer the client the option to sign an ROI (provided by ECHO on the ECHO website). Explain the reasons for the ROI and that the ROI enables referrals to be made through the database
 - ii. Click the “add release of information” button

Release of Information: **None**

Client Information				Service Transactions					
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers				
Release of Information <table border="1"> <thead> <tr> <th>Provider</th> <th>Permission</th> </tr> </thead> <tbody> <tr> <td colspan="2"> Add Release of Information </td> </tr> </tbody> </table> No matches.						Provider	Permission	Add Release of Information	
Provider	Permission								
Add Release of Information									

- iii. Select the members of the household the release covers
- iv. Fill out the rest of the form
 1. Release of Information is good for 7 years, calculate the end date with this in mind
 2. No need to fill out the 'witness' portion as this should be documented on the physical ROI
- v. Click "save release of information"

Release of Information Data

Provider *	ECHO West Texas CoC (2)	Search	My Provider	Clear
Release Granted	Yes			
Start Date *	02 / 04 / 2025			
End Date *	02 / 04 / 2025			
Documentation	Signed Statement from Client			
Witness				

Print Release of Information

Save Release of Information

Exit

- vi. **Required:** Add a scan of the physical ROI to the client's ROI record
 1. Scan the physical, signed ROI and save on computer
 2. Click the paper clip icon next to the release of information record just created

Release of Information

Provider	Permission	Start Date	End Date
ECHO West Texas CoC	Yes	02/04/2025	02/04/2025

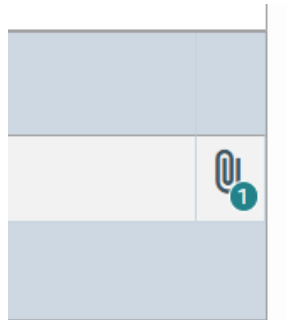
Add Release of Information

Showing 1-1 of 1

Exit

3. In the pop-up, click the "add new file attachment" button
4. Upload the scanned document
 - a. Click the "choose file" button
 - b. Find the scanned file, double click the file name

5. In the description, type whether the release was granted and the end date of the ROI
6. Click the “upload” button
7. Click the “exit” button in the pop-up
8. If done properly, there should be a 1 under the paper clip



- c. If there is an existing ROI record
 - i. Check to see if your Provider is listed under the Provider section of the ROI record set

Release of Information					
	Provider	Permission	Start Date	End Date	
	Grace Campus (TH - Transitional Housing)	yes	01/01/2025	01/01/2032	
	Serve Lubbock (SSO)	yes	10/24/2024	12/24/2031	
	UMC Lubbock (Community Health)	yes	02/11/2025	12/24/2031	
Add Release of Information Showing 1-3 of 3					

1. If your provider is listed and the ROI is still valid, no further action is needed, continue to the next item
2. If your provider is not listed, click the paperclip that has a 1 under it
- ii. Verify the ROI on file
 1. Click the magnifying glass

File Attachments

		Date Added	Name	Description	Type	Provider	
			01/01/2025	HMIS ROI- English (1).pdf	ROI ends 12/24/2031	pdf	Grace Campus (TH - Transitional Housing)
Add New File Attachment Showing 1-1 of 1							

2. Download and verify the existing ROI by checking that it was signed by the client and checking the date signed



3. Make note of the date signed & the family members covered, then exit the pop up
4. Click the “add release of information” button
5. Fill out the pop-up
 - a. making sure to select the members of the household the ROI covers
 - b. Enter the date the physical ROI expires, 7 years from the date signed
 - c. Select ‘verification from another institution’ from the documentation drop down
 - d. Click ‘save release of information’ button

Household Members

To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.

- ☐ (3) Couple With No Children
- ☒ (6) Kirk, James T
- ☐ (7) Uhura, Nyota (Left Household: 02/11/2025)
- ☐ (14) Couple With No Children
- ☒ (6) Kirk, James T
- ☐ (7) Uhura, Nyota

Release of Information Data

Provider *	ECHO West Texas CoC (2)	<button>Search</button>	<button>My Provider</button>	<button>Clear</button>
Release Granted *	Yes			
Start Date *	05 / 20 / 2025			
End Date *	12 / 24 / 2031			
Documentation	Verification from Other Institution			
Witness				

Save Release of Information

Cancel

- iii. The record set should share the same end date and look similarly to the below snippet

Release of Information				
	Provider	Permission	Start Date	End Date
	Serve Lubbock (SSO)	Yes	10/24/2024	12/24/2031
	UMC Lubbock (Community Health)	Yes	02/11/2025	12/24/2031
	ECHO West Texas CoC	Yes	05/20/2025	12/24/2031
<button>Add Release of Information</button>				
Showing 1-3 of 3				

4. Click the “service transactions” tab next to the “client information tab”

Release of Information: LHO 1/1/00/2001

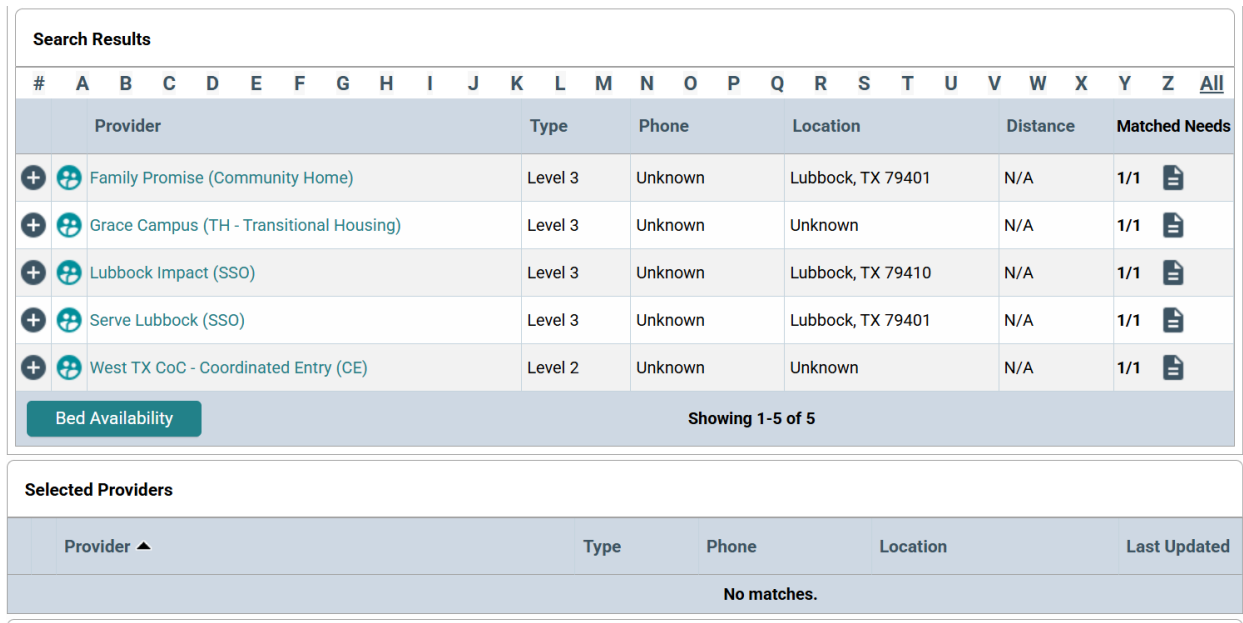
Client Information	Service Transactions
Service Transaction Dashboard	
Add Need Add Service Add Multiple Services Add Referrals Eligibility Search View Previous Service Transactions View Shelter Stays View Entire Service History	

5. Click the “Add Referral” or “Eligibility Search”
 - a. If using “add referral”
 - i. Select “Housing related coordinated entry” service code
 - ii. Click add terms

This Client is not a member of any Households.

Needs Assignment						
Select up to 5 Needs Service Code Quicklist - Homelessness Prevention Programs (BH-0500.3140) - Housing Related Coordinated Entry (BH-0500.3200) - Substance Use Disorder Education/Prevention (RX-8250) - Transportation (BT) - Tutoring Services (HL-8700) - Utility Assistance (BV-8900) Add Terms Service Code Look-Up Add Terms & Go To Search Results						
Referral Provider Quicklist <table border="1"> <thead> <tr> <th>Provider</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>-Select-</td> <td> + </td> <td> Add Provider Bed Availability </td> </tr> </tbody> </table>	Provider			-Select-	+	Add Provider Bed Availability
Provider						
-Select-	+	Add Provider Bed Availability				

- iii. Click the plus sign to the left of the “west TX CoC - Coordinated Entry (CE)” provider
 1. To remove a provider after clicking the plus sign, scroll down and click the red minus sign to remove them from your selected providers



▼ Need Data

Date of Need * 01 / 01 / 2025   12 : 00 : 00 AM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
 Housing Related Coordinated Entry (BH-0500.3200)		Identified  -Select-  -Select- 	

Remove All Needs

Save Needs ONLY Save ALL Clear ALL Cancel

b. If using “eligibility search”

- i. Select the “housing related coordinated entry” service code
 1. Select any other service codes to match client with other services
 2. **Note:** selecting any housing code other than emergency shelter or domestic violence shelter should result in only the West TX CoC CE project result for housing
- ii. Click add selected service terms

Eligibility Service Code Quick List

Eligibility Service Code Quick List

Health Care (L)

Homelessness Prevention Programs (BH-0500.3140)

Housing Related Coordinated Entry (BH-0500.3200)

Substance Use Disorder Education/Prevention (RX-8250)

Add Selected Service Terms Add All Quick List Terms Add All Eligibility Terms Service Code Look Up

- iii. Under the “eligibility service search results” find the “housing related coordinated entry” result

Eligibility Service Search Results

Service Term	Service Code	Eligible	Potential	Ineligible
☐  Housing Related Coordinated Entry	BH-0500.3200	0/1 	1/1 	0/1 

Check ALL Terms Uncheck ALL Terms Showing 1-1 of 1

Selected Eligibility Service Terms

Service Term	Service Code	Eligible	Potential	Ineligible
No matches.				

Check ALL Terms Uncheck ALL Terms

- iv. To the right of the result, check the eligible, potential, and ineligible columns



1. If eligible says 1/1, click the plus next to “Housing related coordinated entry”
2. If potential says 1/1, click the magnifying glass next to the potential 1/1
 - a. In the new window, click “answer additional questions for checked providers”
 - b. Have the client answer the questions to the best of their ability, they do not have to answer all of them if they do not wish to
 - c. Click “save and exit”
 - d. The 1/1 should move to the eligible column

Eligibility Service Search Results					
	Service Term	Service Code	Eligible	Potential	Ineligible
☐ +	Housing Related Coordinated Entry	BH-0500.3200	1/1	0/1	0/1
Check ALL Terms		Uncheck ALL Terms		Showing 1-1 of 1	

- e. Click the plus next to the “Housing Related Coordinated Entry” service
3. **Note:** if the ineligible column says 1/1 for the “housing related coordinated entry” program, use the “add referral” workflow above or contact the ECHO Coordinated Entry Team
 - v. Click “continue” at the bottom of the page
 - vi. Scroll to the “search results” section and click the plus next to the “west TX CoC - Coordinated Entry (CE)” provider

Search Results

#A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

	Provider	Type	Phone	Location	Distance	Matched Needs
+ West TX CoC - Coordinated Entry (CE)	Level 2	Unknown	Unknown	N/A	1/1	

Bed Availability

Showing 1-1 of 1

Selected Providers

Provider ▲	Type	Phone	Location	Last Updated
No matches.				

▼ Refer to Providers

- vii. Scroll down and enter a follow up date as desired for the referring agency, not required
 - viii. Check the “check to notify community service providers by email” box



Needs Referral Date *	12 / 01 / 2024			12 : 00 : 00 AM
Referral Ranking	-Select- ▼			
VI-SPDAT Score	Please Select a VI-SPDAT Score	Search	Clear	
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score	Search	Clear	
VI-FSPDAT Score	Please Select a VI-FSPDAT Score	Search	Clear	
Type of PATH Referral	-Select- ▼			
If any "Type of PATH Referral" made, select Outcome	-Select- ▼			
Type of RHY Referral (Retired)	-Select- ▼			
Projected Follow Up Date				
Follow Up User	Lubbock Impact (SSO) (27)	Search	My Provider	Clear
	-Select- ▼			
☒ Check to notify Community Services Providers by Email.				

- ix. Verify all the information for the referral, then click “save all” at the bottom of the page

Receiving Referrals to Coordinated Entry From Other Agencies

Only those with approved access to the Coordinated Entry Project within HMIS will have the ability to resolve referrals made to CE from other agencies.

1. Change your “enter data as” to the “West TX CoC - Coordinated Entry” Project (top right of the page)

ECHO West Texas CoC
February 19, 2025

Enter Data As West TX CoC - Coordin...
 Back Date Mode
 Connect To BusinessObjects

Last Viewed
Favorites
Home
Clients

Home > Home Page Dashboard

Type here for Global Search

System News (1)

Agency News (0)

Follow Up List (7)

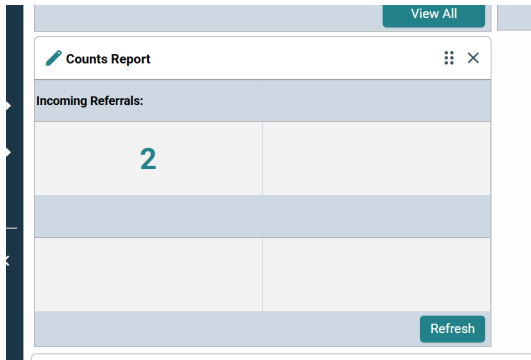
Date	Headline	Client ID	Type	Date	Time Remaining
11/13/2024	Welcome to the Training Site!	18	Referral	01/15/2025	Past

2. Access the Incoming Referrals (using reports or homepage counts report)
 - a. Using the homepage counts report
 - i. On your ECHO Database Homepage, find the counts report
 1. If you do not have the count report on your Homepage dashboard or do not have incoming referrals on the counts report, refer to the



ECHO Database User Guide(s) to add the count report/referrals to your dashboard

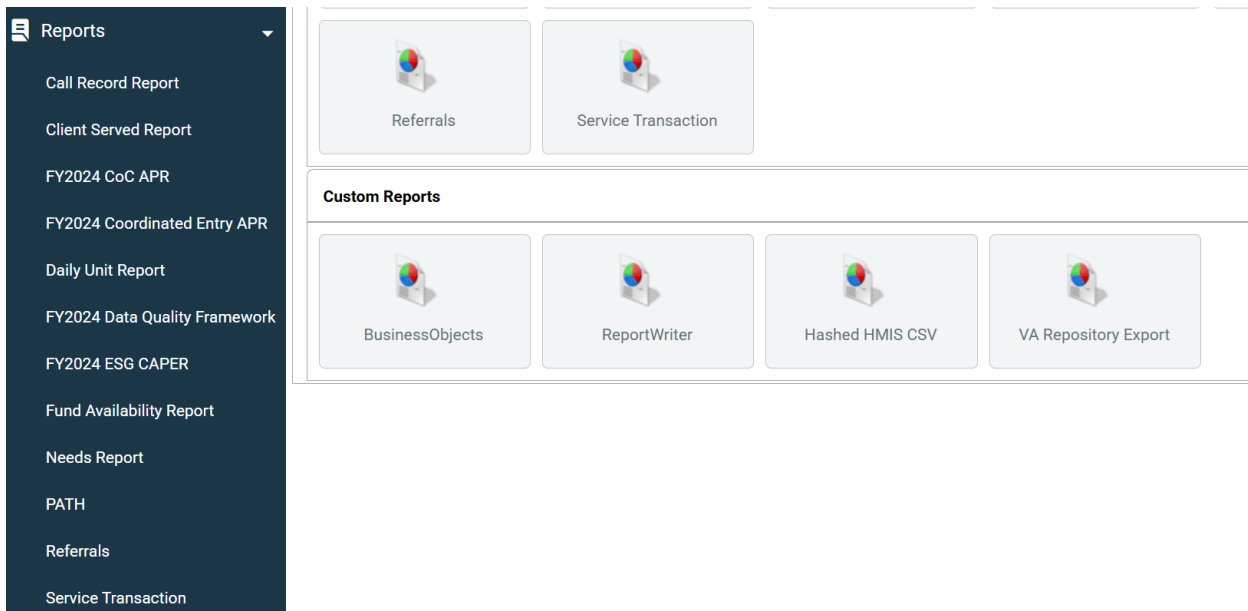
- ii. Click the number representing the incoming referrals



- iii. Click the Client ID Number to open the client file
- iv. Navigate to the open referral
 1. Click the “service transaction tab”; or
 2. Click “view entire service history”; or
 3. Click the “referrals” tab
 4. Here you will see the open referrals for the client
 5. Click the pencil icon next the the coordinated entry referral to open the referral

b. Using the reports section

- i. Navigate to the reports page and click the “referrals” report



- ii. Ensure the provider is “West TX CoC - Coordinated Entry”
- iii. Select “this provider only”
- iv. Referral Type, select “Incoming referrals to provider”
- v. Referral Status, select “Outstanding”
- vi. Select Date Range as needed, not required

vii. Click Build Report

Reports > Referrals

Type here for Global Search

Report Options

Provider *	West TX CoC - Coordinated Entry (CE) (4) ▾
	☐ This provider AND its subordinates ☒ This provider ONLY
Referral Type *	Incoming referrals to provider ▾
Referral Status	☒ Outstanding ☐ Closed ☐ ALL
Referral Outcome	-All- ▾
Referral Date Range	/ / Calendar Refresh Clear
Sort Order	Please Select a Sort Order Select Clear

Export Report

viii. Click the “Need Type” for the client you will begin working with to pull up the referral

3. Set the referral outcome and close the referral

a. In the “referral data” section, select “accepted” for the referral outcome

Referral Data

Referred-To Provider	West TX CoC - Coordinated Entry (CE) (4)
Needs Referral Date *	12 / 10 / 2024 Calendar Refresh Clear
Referral Ranking	-Select- ▾
VI-SPDAT Score	Please Select a VI-SPDAT Score Search
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score Search
VI-FSPDAT Score	Please Select a VI-FSPDAT Score Search
Referral Outcome	Accepted ▾

b. Scroll down to the need status & Outcome section

c. Need status = closed

d. Outcome of need = fully met

i. **Note:** this is to alert the referring agency that the referral has been seen and client has/will be entered into the housing response system, not to indicate the client has been placed in housing.

e. Click Save & Exit at bottom of page

4. Verify existing ROI



- a. **Note:** In order for there to be a referral there would be an existing ROI that needs to be verified by any project, including Coordinated Entry, that accesses the client file
- b. Navigate to the “ROI” tab in the “client information section

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Measurements

Activities

Release of Information

Provider	Permission	Start Date	End Date
Add Release of Information		No matches.	

- c. Verify that there is a valid existing ROI on file by downloading the ROI attachment (click the magnifying glass with the 1 under it) and verifying the signatures, dates, and covered family members
- d. Click the “add release of information” button
- e. In the pop-up:
 - i. Release granted = Yes
 - ii. End Date = (end date of existing ROI)
 1. ROIs are valid for 7 years after date of signing unless client revokes consent
 - iii. Documentation = verification from another institution
- f. Click Save Release of Information button

Household Members

This Client is not a member of any Households.

Release of Information Data

Provider *

West TX CoC - Coordinated Entry (CE) (4)

Search

My Provider

Clear

Release Granted *

Yes

Start Date *

12 / 04 / 2024

End Date *

11 / 06 / 2031



Documentation

Verification from Other Institution

Witness

Save Release of Information

Cancel

Date: 12/04/2024 12:00:00 AM

Service Transactions

Entry / Exit

Case Managers

Case Plans

Permission

Start Date

End Date

Yes

11/06/2024

11/06/2031



1

Showing 1-1 of 1

Exit

5. Contact client and set up Coordinated Entry Intake
 - a. Find the client's contact information on the client's profile page
 - b. Contact client to set up in person, virtual, or over the phone intake to Coordinated Entry



Initial CE Enrollment

After receiving a referral from within the database **or** for walk-in clients:

1. Ensure you are working under the West TX CoC - Coordinated Entry project in “enter data as”
2. Change backdate to reflect the actual date of intake as necessary
3. Access client record
 - a. Refer to user guides on accessing existing client or inputting new client
4. Verify Client’s existing ROI or offer client opportunity to sign an ROI for quicker matching to services with internal system referrals (as necessary)
 - a. Refer to user guides & policies and procedures for more guidance & requirements on privacy notices and ROIs
 - b. **Note:** if client declines signing an ROI, a review of the privacy notice with the client does allow for their data to be entered and their case to be discussed within Coordinated Entry and the housing response system. An ROI is only required for referrals made within the system and for answers to HUD questions to migrate from initial entry to another provider. **In addition**, if a client declines to have their information input into the database altogether, contact the Coordinated Entry Lead
5. Click the “Entry/Exit” tab in the client file
6. Click Add Entry/Exit button

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans

i Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
No matches.						

Add Entry / Exit

Exit

7. In the pop-up window
 - a. Select all members of household to be housed through CE as needed for families
 - b. Provider = West TX CoC - Coordinated Entry
 - c. Type = Hud
 - d. Date = [initial date of intake into CE]

Household Members

This Client is not a member of any Households.

Project Start Data - (23) Burnham, Michael

Provider *

West TX CoC - Coordinated Entry (CE) (4)

Search

My Provider

Clear

Type *

HUD ▾

Project Start Date *

12

/

11

/

2024

📅

↺

📅

12 ▾

:

00 ▾

:

00 ▾

AM ▾

Save & Continue

Cancel

- e. Click Save & Continue
8. Ask the various questions to the client(s) to gather/enter required information (**note:** refer to the CoC data quality plan and CE Policies and Procedures for required data capture elements, timeframes, and thresholds)
 - a. Section “required for all clients” should be answered for all persons, including minors, entering the CE system

16

WTX Coordinated Entry

Required for All Clients

Relationship to Head of Household *	-Select-	G
Date of Birth	04 / 30 / 1990	G
Date of Birth Type	Full DOB Reported (HUD)	G
To select multiple values hold down the "ctrl" or "cmd" key and click on each value		
Race and Ethnicity	- American Indian, Alaska Native, or Indigenous - Asian or Asian American - Black, African American, or African - Hispanic/Latina/e/o - Middle Eastern or North African - Native Hawaiian or Pacific Islander - White - Client doesn't know - Client prefers not to answer - Data not collected	G

- i. To answer sections with a magnifying glass next to the section title, such as Disabilities, click the “Hud Verification” link on the right side of the section banner (may need to scroll to the right)

Insurance			
Disabilities			
Disability Type	Disability determination	Start Date *	End Date
Add			
HUD Verification			
Health Insurance			
Start Date *	Health Insurance Type	Covered?	End Date
Add			

- ii. Select “No (HUD)” radio button to move all answers to No
 1. If the answer is No to all, click the Save & Exit button to save and close responses for that section

Select the Disability determination value for all incomplete Disability Type records

- ☒ No (HUD)
☐ Client doesn't know (HUD)
☐ Client prefers not to answer (HUD)
☐ Data not collected (HUD)
☐ Incomplete

Disability Type	Disability determination					
	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client prefers not to answer (HUD)	Data not collected (HUD)	Incomplete
Alcohol Use Disorder (HUD)	☐	☒	☐	☐	☐	☐
Both Alcohol and Drug Use Disorder (HUD)	☐	☒	☐	☐	☐	☐
Chronic Health Condition (HUD)	☐	☒	☐	☐	☐	☐
Developmental (HUD)	☐	☒	☐	☐	☐	☐
Drug Use Disorder (HUD)	☐	☒	☐	☐	☐	☐
HIV/AIDS (HUD)	☐	☒	☐	☐	☐	☐
Mental Health Disorder (HUD)	☐	☒	☐	☐	☐	☐
Physical (HUD)	☐	☒	☐	☐	☐	☐

- iii. Select the “Yes (HUD)” radio button for any options as appropriate
- iv. Fill out the information required in the pop-up window
- v. Click Save

Disability determination ☐ Client doesn't know (HUD)

Add Recordset ×

Disabilities

Disability Type	Chronic Health Condition (HUD)
Disability determination	Yes (HUD)
If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	Yes (HUD) ▼ G
Start Date *	12 / 11 / 2024 📅 🔄 📅 G
Note on Disability	G
Above condition is going to be long term? (Retired)	-Select- ▼ G
End Date	/ / 📅 🔄 📅 G

Save Cancel

- vi. **Note:** answers to these subsections can be accessed by clicking the magnifying glass icon or by using the navigation buttons at the bottom of the section after saving & exiting the verification windows

Disabilities HUD Verification

Disability Type	Disability determination	Start Date *	End Date
Alcohol Use Disorder (HUD)	No (HUD)	12/11/2024	
Both Alcohol and Drug Use Disorder (HUD)	No (HUD)	12/11/2024	
Chronic Health Condition (HUD)	Yes (HUD)	12/11/2024	

Add Showing 6-8 of 8 **First** **Previous** **Next** **Last**

vii. **Note: to update responses, refer to the *Follow Ups* section of this document**

b. Section “required for all heads of household and adults” should be answered for **all adults (18+)** in the household, not just head of household

Required for All Heads of Household and Adults

Enrollment CoC	-Select- G
Prior Living Situation	-Select- G
Length of Stay in Previous Place	-Select- G
Income from Any Source	-Select- G

Monthly Income HUD Verification

Monthly Amount	Source of Income	Receiving Income Source?
Add View Gross Income		

c. **Only for heads of households: Add a coordinated entry event for intake**

i. in the Coordinated Entry Only Section, find the Coordinated Entry Event and click the Add button for that section

Coordinated Entry Only

Coordinated Entry Assessment

Date of Assessment *	End Date	Assessment Location	Assessment Type	Assessment Level	Prioritization Status
Add					

Coordinated Entry Event

Start Date *	Date of Event *	Event *	Referral Result	Date of Result
Add				

ii. Fill out the information in the pop-up

1. For the Event, select one of the Access Events as appropriate (refer to the CE Lead or applicable policies & procedures for more guidance)



- a. **Referral to prevention assistance** for any person who is currently housed who is referred to prevent their homelessness
- b. **Problem Solving/Diversion/Rapid Resolution intervention or service** for any person whose housing crisis can be resolved quickly with services outside of the CE Housing system
- d. **IMPORTANT:** if multiple “Events” occur, a separate entry must be made for each to reflect the event(s) that took place during any given contact event with client.
- e. **Note:** *Refer to the Housing/Crisis Needs Assessment & Update section of this document for information on how to fill out the Coordinated Entry Assessment and SPDAT sections of the Intake form*

Coordinated Entry Only

Q Coordinated Entry Assessment

Date of Assessment *	End Date	Assessment Location	Assessment Type	Assessment Level	Prioritization Status
Add					

Q Coordinated Entry Event

Start Date *	Date of Event *	Event *	Referral Result	Date of Result
Add				

9. To answer questions for multiple members of a household

- a. Fill out information for the first client (highlighted in blue to the left of the screen)
- b. Scroll to the bottom of the page and click Save (**do not click Save and Exit**, this will exit you from the entry process)
- c. Scroll back to the top and select the next client on the left of the page
- d. Fill out information as appropriate for adults and minor children/dependants, clicking ‘save’ at the bottom of each client’s information page
- e. **Remember:** click the save button at the bottom of the page for each person before moving on to the next member of the household

Housing Needs Assessment

This section applies only to those persons who have been trained and verified to assess client(s) for housing and other crisis needs. **Note:** only complete an assessment after CE Enrollment is completed. An assessment cannot be completed without a CE enrollment.

1. Access the client record
2. Navigate to the “Entry/Exit” tab on the client record
3. Locate the client’s “West TX CoC - Coordinated Entry (CE)” project entry
4. Click on the “Interim” review paper icon **or**

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Grace Campus (TH - Transitional Housing) (30)	HUD	02/25/2025				
Grace Campus (TH - Transitional Housing) (30)	HUD	02/24/2025	02/25/2025			
West TX CoC - Coordinated Entry (CE) (4)	HUD	12/11/2024				

- Note:** do not create a new “Entry/Exit”; you are updating the existing entry/exit with an assessment. If there is not existing open entry/exit, refer to the CE intake portion of this document.
- Note:** For you to enter an assessment, the CE entry must not have an exit date. If the enrollment has an exit date, a new entry must be created.

5. Click “add interim review”
6. Select “update” from the interim review type drop down
7. Change date as necessary

Add Interim Review - (23) Burnham, Michael

Interim Review Data	
Entry / Exit Provider	West TX CoC - Coordinated Entry (CE) (4)
Entry / Exit Type	HUD
Interim Review Type *	Update
Review Date *	03 / 03 / 2025 11 : 08 : 25 AM

Interim Reviews Associated

Review Date	Review Type
03/03/2025	Update
12/11/2024	Update

Add Interim Review

Save & Continue **Cancel**

8. Click save & continue
9. Scroll to the bottom of the pop-up and find the appropriate assessment
 - a. VI-FSPDAT - **Only** for Households with minor children
 - b. VI-SPDAT - For Individuals (including couples without children)
 - c. TAY-VI-SPDAT - **Only** for unaccompanied youth under 18 years of age

Coordinated Entry Only

Q Coordinated Entry Assessment

Date of Assessment *	End Date	Assessment Location	Assessment Type	Assessment Level	Prioritization Status
12/11/2024			In Person	Housing Needs Assessment	Placed on Prioritization List

Add Showing 1-1 of 1

Q Coordinated Entry Event

Start Date *	Date of Event *	Event *	Referral Result	Date of Result
12/11/2024	12/11/2024	Referral to scheduled Coordinated Entry Housing Needs Assessment		

Add Showing 1-1 of 1

Q VI-FSPDAT v2.0

Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	E. FAMILY UNIT	GRAND TOTAL

Add

Q VI-SPDAT v2.0

Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL
12/11/2024	0	1	3	3	3	10

Add Showing 1-1 of 1

Q TAY-VI-SPDAT v1.0

Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL

Add

Save Save & Exit Exit

10. Click Add
11. Answer the questions with the client in accordance with the assessor training you've received
12. When completed, click the "calculate" button to receive the score

PRE-SURVEY	0
A. HISTORY OF HOUSING AND HOMELESSNESS	1
B. RISKS	3
C. SOCIALIZATION & DAILY FUNCTIONS	3
D. WELLNESS	3
GRAND TOTAL	10

Calculate

(8+) Recommendation: an assessment for Permanent Supportive Housing/Housing First

Print Recordset **Save** **Save and Add Another** **Cancel**

13. Click Save

14. Navigate to the Coordinated Entry Assessment section of the entry

15. Click add

Coordinated Entry Only

Coordinated Entry Assessment

Date of Assessment *	End Date	Assessment Location	Assessment Type	Assessment Level	Prioritization Status
12/11/2024			In Person	Housing Needs Assessment	Placed on Prioritization List

Add **Showing 1-1 of 1**

Coordinated Entry Event

16. Fill out the pop-up

- Date of assessment = date of assessment
- End date = blank
- Assessment Location = location you completed the assessment
- Assessment Type = Phone / virtual / or in person
- Assessment Level = Housing Needs Assessment
- Prioritization Status =
 - Placed on Prioritization List - use if there is a waitlist or if there is no available housing at the time of assessment
 - Not Placed on Prioritization List - use if there is available housing, must still notify CE Lead of assessment

17. Click Save

18. Notify the CE Lead of the assessment completion, include:

- Client ID number
- Assessment score
- Date of assessment
- Recommendations made to client

- e. Any other information you think the CE lead may find important

Interim Reviews / Client CE Updates

For any updates to the client's CE information, such as income or disability status, **or** to complete interim reviews while the client is waiting for housing. Interim reviews are completed every **30/60/90/120/365 days**. Another Housing Needs Assessment is not needed except for annual reviews or unless instructed to conduct another assessment by the CoC Lead Agency.

Reasons for Update include but are not limited to:

- Change in income
- Change in household
- Change in disability status
- Referral to housing project with acceptance result from said project (accepted/rejected)
- Referral to case management
- etc.

1. Access the client record
2. Navigate to the "Entry/Exit" tab
3. Click the "interim review" paper icon next to the West TX CoC - Coordinated Entry project entry

Client Information		Service Transactions																																		
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Measurements	Activities																												
Reminder: Household members must be established on Households tab before creating Entry / Exits																																				
Entry / Exit <table border="1"> <thead> <tr> <th>Program</th> <th>Type</th> <th>Project Start Date</th> <th>Exit Date</th> <th>Interims</th> <th>Follow Ups</th> <th>Client Count</th> </tr> </thead> <tbody> <tr> <td>Grace Campus (TH - Transitional Housing) (30)</td> <td>HUD</td> <td>02/25/2025</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Grace Campus (TH - Transitional Housing) (30)</td> <td>HUD</td> <td>02/24/2025</td> <td>02/25/2025</td> <td></td> <td></td> <td></td> </tr> <tr> <td>West TX CoC - Coordinated Entry (CE) (4)</td> <td>HUD</td> <td>12/11/2024</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> Add Entry / Exit Showing 1-3 of 3									Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	Grace Campus (TH - Transitional Housing) (30)	HUD	02/25/2025					Grace Campus (TH - Transitional Housing) (30)	HUD	02/24/2025	02/25/2025				West TX CoC - Coordinated Entry (CE) (4)	HUD	12/11/2024				
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West TX CoC - Coordinated Entry (CE) (4)	HUD	12/11/2024																																		

4. Click "Add Interim Review" button in the pop up
5. Fill out the information in the pop-up
 - a. Entry/Exit provider = West TX CoC - Coordinated Entry (CE)
 - b. Entry/Exit type = HUD
 - c. Interim Review Type = Select as appropriate (30/60/90/120/annual/update)
 - d. Review Date = Date of interim review, change as needed
6. Click Save & Continue
7. Update information as needed:

- a. To update disabilities, health insurance, income, or non-cash benefits sections (aka subassessments):
 - i. **Important:** do not delete any entry in the subassessment sections. This process shows progress over time. If done correctly, the record should show end date statuses for the applicable record, and a new record with the updated information should show having started the day after the end date of the previous records
 - ii. **Note:** Be sure to answer/update any supplemental questions in addition to the subassessment
 1. For example, if client started receiving health insurance, change the answer to the "covered by health insurance" question, then update the sub assessment
 - iii. Access the subassessment answers by clicking the magnifying glass next to the appropriate section

Does the client have a disabling condition? ■ Yes (HUD) G

Covered by Health Insurance ■ No (HUD) G

Disabilities
HUD Verification ✓

	Disability Type	Disability determination	Start Date *	End Date
	Physical (HUD)	No (HUD)	12/11/2024	
	Mental Health Disorder (HUD)	Yes (HUD)	12/11/2024	
	HIV/AIDS (HUD)	No (HUD)	12/11/2024	
	Drug Use Disorder (HUD)	No (HUD)	12/11/2024	
	Developmental (HUD)	No (HUD)	12/11/2024	

Add
Showing 1-5 of 8
First
Previous
Next
Last

Health Insurance
HUD Verification ✓

	Start Date *	Health Insurance Type	Covered?	End Date
	12/11/2024	Other	No	
	12/11/2024	Indian Health Services Program	No	
	12/11/2024	State Health Insurance for Adults	No	
	12/11/2024	Health Insurance obtained through COBRA	No	
	12/11/2024	Employer - Provided Health Insurance	No	

Add
Showing 1-5 of 10
First
Previous
Next
Last

- iv. In the pop up, find the record to be updated
- v. Click the pencil icon next to the record to be updated

25

Show All Health Insurance Records

Health Insurance					
	Provider	Start Date	Health Insurance Type	Covered?	End Date
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	Other	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	Indian Health Services Program	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	State Health Insurance for Adults	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	Health Insurance obtained through COBRA	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	Employer - Provided Health Insurance	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	Private Pay Health Insurance	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	Veteran's Health Administration (VHA)	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	State Children's Health Insurance Program	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	MEDICARE	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	MEDICAID	No	

Add Showing 1-10 of 10

Exit

vi. Set the end date to yesterday's date

Edit Recordset - (23) Burnham, Michael

Health Insurance	
Start Date *	12 / 11 / 2024
Health Insurance Type	Indian Health Services Program
(If Yes to Other) Specify Source	
Covered?	No
(HOPWA) If Private Pay Insurance, Specify	
(HOPWA) If No, Reason not covered	-Select-
End Date	03 / 05 / 2025

Print Recordset Save Cancel

vii. Click Save

viii. Click Add

ix. Fill out the new pop-up as appropriate

1. Do not fill out an end date

Add Recordset

Health Insurance

Start Date *

03 / 06 / 2025

Health Insurance Type

MEDICAID

(If Yes to Other) Specify Source

Covered?

Yes

(HOPWA) If Private Pay Insurance, Specify

(HOPWA) If No, Reason not covered

-Select-

End Date

Save

Cancel

x. Click save

Show All Health Insurance Records

Health Insurance					
	Provider	Start Date	Health Insurance Type	Covered?	End Date
	West TX CoC - Coordinated Entry (CE) (4)	03/06/2025	Indian Health Services Program	No	
	West TX CoC - Coordinated Entry (CE) (4)	03/06/2025	MEDICAID	Yes	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	Other	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	Indian Health Services Program	No	03/05/2025
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	State Health Insurance for Adults	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	Health Insurance obtained through COBRA	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	Employer - Provided Health Insurance	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	Private Pay Health Insurance	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	Veteran's Health Administration (VHA)	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	State Children's Health Insurance Program	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	MEDICARE	No	
	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	MEDICAID	No	03/05/2025

Add

Showing 1-12 of 12

Exit

- b. For the following client event updates (generally when referrals are made); **note:** *every client event update must have a result date & outcome before client is exited from the CE project:*

i. Events

- Referral to Prevention Assistance project

2. Problem Solving/Diversion/Rapid Resolution intervention or service
3. Referral to scheduled Coordinated Entry Crisis Needs Assessment
4. Referral to scheduled Coordinated Entry Housing Needs Assessment
5. Referral to post-placement/follow-up case management
6. Referral to Street Outreach project or services
7. Referral to Housing Navigation project or services
8. Referral to Non-continuum services: Ineligible for continuum services
9. Referral to Non-continuum services: No availability in continuum services
10. Referral to Emergency Shelter bed opening
11. Referral to Transitional Housing bed/unit opening
12. Referral to Joint TH-RRH project/unit/resource opening
13. Referral to RRH project resource opening
14. Referral to PSH project resource opening
15. Referral to Other PH project/unit/resource opening
16. Referral to emergency assistance/flex fund/furniture assistance
17. Referral to a Housing Stability Voucher

- ii. Scroll to the Coordinated entry only section
- iii. In the Coordinated Entry Even Section, select add

Coordinated Entry Only

Q Coordinated Entry Assessment

Date of Assessment *	End Date	Assessment Location	Assessment Type	Assessment Level	Prioritization Status
12/11/2024			In Person	Housing Needs Assessment	Placed on Prioritization List
Add		Showing 1-1 of 1			

Q Coordinated Entry Event

Start Date *	Date of Event *	Event *	Referral Result	Date of Result
12/11/2024	12/11/2024	Referral to scheduled Coordinated Entry Housing Needs Assessment		
Add		Showing 1-1 of 1		

- iv. Fill out the pop-up form with the information as needed.
 1. If a referral is made but no result, fill out:
 - a. Date of event
 - b. Event type
 - c. Supplemental question(s)
 - d. **Note** leave referral result and date of result section empty until you have a result of the referral
 2. If a referral is made and you have a result of that referral
 - a. Date of event
 - b. Event type
 - c. Supplemental questions
 - d. Referral result

- e. Date of result
- v. **If you receive a result of a previous referral:**
 1. Click the pencil next to the coordinated entry event you want to update
 2. Verify the pop-up is filled out correctly
 3. Select the referral result from the drop down
 4. Enter the result date
 5. Click save
 6. The coordinated entry even section should show the referral result and date of result of every entry prior to client being exited from the CE project

Coordinated Entry Event					
	Start Date *	Date of Event *	Event *	Referral Result	Date of Result
	03/06/2025	03/06/2025	Referral to RRH project resource opening		
	12/11/2024	12/11/2024	Referral to scheduled Coordinated Entry Housing Needs Assessment	Successful referral: client accepted	03/06/2025
Add Showing 1-2 of 2					

Housing Matching/Placement/Project Exit

Note: The eligibility search function sends all referrals for housing, other than emergency shelter, to coordinated entry. In order to search/refer to housing in the system from the Coordinated Entry Project, use the standard referral functionality, not the eligibility search. The process for housing placement/navigation is in the Coordinated Entry Policies & Procedures (CE P&P).

1. Match Housing

- a. Using the criteria in the CE P&P, match client with appropriate housing
- b. Refer client to the housing project (only available to those with a valid ROI on file)
 - i. Navigate to the client file
 - ii. Click the service transactions tab

(23) Burnham, Michael Release of Information: Ends 11/06/2031						
Client Information						
Summary	Client Profile	Households	ROI	Service Transactions	Entry / Exit	Case Managers
Case Plans						

- iii. Click "add referrals" button

Client Information

Service Transactions

Service Transaction Dashboard

Add Need

Add Service

Add Multiple Services

Add Referrals

Eligibility Search

View Previous Service Transactions

View Shelter Stays

View Entire Service History

- iv. In the needs assignment section, select the housing service code or lookup the housing service code (i.e. transitional housing)
- v. Click “add Terms & Go to Search Results” button

Add Needs

Household Members

This Client is not a member of any Households.

Needs Assignment

Select up to 5 Needs

Service Code Quicklist

Add Terms

Service Code Look-Up

Add Terms & Go To Search Results

- vi. Scroll down to the search results
- vii. Click the plus sign next to the housing agency you are referring to

Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Provider	Type	Phone	Location	Distance	Matched Needs																						
+ Family Promise (TH - Transitional Housing)	Level 3	Unknown	Lubbock, TX 79403	N/A	1/1																						
+ Redemption Way (DV TH Transitional Housing)	Level 3	Unknown	Unknown	N/A	1/1																						
+ West TX CoC - Coordinated Entry (CE)	Level 2	Unknown	Unknown	N/A	1/1																						

Bed Availability

Showing 1-3 of 3

Selected Providers

Provider	Type	Phone	Location	Last Updated
+ Grace Campus (TH - Transitional Housing)	Level 3	Unknown	Unknown	02/07/2025

Showing 1-1 of 1

- viii. Scroll down to the referral data section
- ix. Add the appropriate SPDAT score (TAY, FSPDAT, OR SPDAT)
 1. Click search next to the appropriate assessment
 2. Find the most recent assessment
 3. Click the plus sign next to the assessment to add it to the referral

Select VI-SPDAT Score



Household Members	VI-SPDAT v2.0	VI-SPDAT																
(23) Burnham, Michael Age: 34	<table border="1"> <thead> <tr> <th>Provider</th> <th>Start Date *</th> <th>PRE-SURVEY</th> <th>A. HISTORY OF HOUSING AND HOMELESSNESS</th> <th>B. RISKS</th> <th>C. SOCIALIZATION & DAILY FUNCTIONS</th> <th>D. WELLNESS</th> <th>GRAND TOTAL</th> </tr> </thead> <tbody> <tr> <td> West TX CoC - Coordinated Entry (CE) (4) </td> <td>12/11/2024</td> <td>0</td> <td>1</td> <td>3</td> <td>3</td> <td>3</td> <td>10</td> </tr> </tbody> </table>	Provider	Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL	West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	0	1	3	3	3	10	
Provider	Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL											
West TX CoC - Coordinated Entry (CE) (4)	12/11/2024	0	1	3	3	3	10											

Showing 1-1 of 1

- x. Set a follow up date as needed
- xi. Check the box for “check to notify community services providers by email”

▼ Refer to Providers

Referral Data

Needs Referral Date *

03 / 06 / 2025

12 : 40 : 06 PM

Referral Ranking

-Select-

VI-SPDAT Score

10

Recorded using VI-SPDAT v2.0 on 12/11/2024 by West TX CoC - Coordinated Entry (CE) (4)

Search

Clear

TAY-VI-SPDAT Score

Please Select a TAY-VI-SPDAT Score

Search

Clear

VI-FSPDAT Score

Please Select a VI-FSPDAT Score

Search

Clear

Projected Follow Up Date

03 / 06 / 2025

Follow Up User

West TX CoC - Coordinated Entry (CE) (4)

Search

My Provider

Clear

Test Person

☒ Check to notify Community Services Providers by Email.

Referrals

Referred-To Provider

Transitional Housing/Shelter

- xii. Verify the information in the next sections
 - 1. Referred to provider matches need and client(s)
 - 2. Need status is “identified” with no additional information selected

Referrals Send Summary

Referred To Provider	Transitional Housing/Shelter	Referred Clients
Grace Campus (TH - Transitional Housing) (30)	☒	(23) Burnham, Michael

▼ Need Data

Date of Need * 03 / 06 / 2025 12 : 40 : 06 PM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
Transitional Housing/Shelter (BH-8600)		Identified -Select- -Select-	

Remove All Needs

- xiii. Click "Save All" Button
 - c. The referral has been sent
 - i. **Note:** The housing agency receiving the referral should do their due diligence and gather all information and paperwork required for their program if this has not already been done during the CE process
 - ii. **Note:** Once the client(s) has/have been accepted or denied, the housing agency should update the referral accordingly
 - d. Update the client coordinated entry event subassessment in their coordinated entry enrollment
 - i. Refer to the above section on Interim Reviews/CE Client Updates to update CE enrollment
 - ii. **Note:** Do not exit the client from the CE project until the client is successfully housed. Doing so can remove them from the prioritization list and result in longer times until they are housed
 - e. Once the referral is updated by the housing provider, record the result of the referral in the client(s) CE project record
 - i. Refer to the interim review/CE client updates section of this document
- ## 2. Coordinated Entry Project Exit
- a. **Note:** Only exit client from CE project once the client has been successfully housed
 - b. Navigate to the client's CE project entry

Client Information Service Transactions

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case Plans

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Grace Campus (TH - Transitional Housing) (30)	HUD	02/25/2025				
Grace Campus (TH - Transitional Housing) (30)	HUD	02/24/2025	02/25/2025			
West TX CoC - Coordinated Entry (CE) (4)	HUD	12/11/2024				

Add Entry / Exit

Showing 1-3 of 3

Exit



- c. Click the pencil icon for exit date
- d. Fill out the pop-up:
 - i. Exit Date = Date client was housed
 - ii. Reason for Leaving = Leave blank
 - iii. Destination = select the appropriate placement destination
 - 1. **Note:** Exits from CE should only happen if client has been successfully housed, has passed away, or has been unreachable for the period of time set in the CE P&P
 - 2. **Note:** if the client has passed or has been unreachable:
 - a. Select the appropriate “reason for leaving” in the drop down
 - i. Passed, select deceased for reason for leaving & destination
 - ii. Unreachable, select unknown/disappeared in reason for leaving & no exit interview completed in destination
 - iv. Make any notes as appropriate for future CE reference
 - v. Click save & continue
 - vi. Make any updates to the client’s CE record as needed
 - 1. Refer to the above section on Interim Reviews/CE Client Updates on how to update record
 - vii. Click “save & exit” button at bottom of page

Follow ups

No follow ups from the CE Project are required to be documented in HMIS

CE ReEntry

If a client was successfully placed into housing other than emergency shelter and has become homeless again, a new CE project entry must be created. Refer to the Initial CE Intake portion of this document for details on the entry process.

Prevention/Diversion Process

Prior to entry into the coordinated entry project in HMIS, all reasonable measures must be attempted to help the presenting person or family achieve or maintain stable housing prior to enrollment in the CE Project. This could include creative solutions such as rental assistance, one time assistance, utility assistance, vouchers, staying with friends or family to get back on their feet, etc.

The ECHO Database can assist in attempting prevention or diversion by offering a directory of participating providers and their services as well as offering an eligibility engine that can help match people to services they qualify for. Please refer to the ECHO Database user guides for more information on database workflows and processes.

Refer to the CE Policies and Procedures for more information on Prevention/Diversion.