Coordinated Entry for CE Providers | Quick Reference Guide

ClientTrack™

Coordinated Entry in ClientTrack

ClientTrack is your **Homeless Management Information System (HMIS).**

ClientTrack gives you everything you need in one place. Here are some of the features you will find at hand, including Coordinated Entry, real-time bed and facility management, case notes, eligibility assessments on client intake, closed-loop referrals, and much more.

Coordinated Entry processes help communities **prioritize assistance based on vulnerability and severity of service needs** to ensure that people who need assistance the most can receive it in a timely manner.

These services include, but are not limited to:

1. Rapid Rehousing
2. Emergency Shelter
3. Homeless Prevention
4. Permanent Supportive Housing
5. Family-based Setting Support Program
6. Financial/Rental Assistance
7. Supportive Services

Coordinated Entry Workflow for CE Provider.

1 Active Client Search

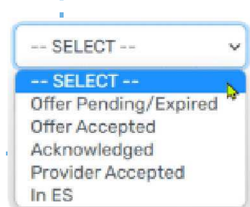
The **Provider Housing Queue** is where **Active clients** are waiting on provider referrals prioritized by the VI-SPDAT score.

This will only show CE Clients who have been referred to your organization and have accepted the vacancy offer.

- You may search for a client by:
  - Client ID
  - First Name
  - Last Name
  - Referral Status
  - Facility Name

Referral Status

This search option will allow you to narrow down your search, depending on the stage of the intake process your client is in.



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2 Accept or Reject Vacancies

When the agency is ready to accept or reject a vacancy, ClientTrack enables a straightforward workflow.

- If no existing HMIS record is found, you may start the **Basic Client Information Assessment.**
- Select the **"Initiate Client Intake (Accepts/Reject)"** option.
- Next, **approve** or **reject** the referral.

> If a vacancy is **approved**, the system will ask you to process a new Client Enrollment. Please follow your standard **Client Enrollment/Intake assessment.**

3 Client Placement

When a client-to-provider match is identified a referral is made.

- The **Add New Referral** form will provide this functionality. The user can reserve the vacancy and the Referral Status is updated.
- The **Referral Status** field will appear on the Housing Queue to assist CE Managers in managing the waitlist to avoid making duplicate referrals.
- Once you have completed this part of the workflow, you're done!

> **Important:**
>
> When a placement is made, a notification via email will be sent to the referring Case Manager. Remember to leave your notes in the "**Comments**" box.

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4 Vacancy Assessment

Adding a new vacancy

- To add a new vacancy, select the Providers icon on the left-hand menu. Then, Select Vacancies.
- Next, select "**Add New**" and proceed to complete the Vacancy Assessment.

Vacancy Assessment

This part of the workflow will require you to input detailed information regarding the vacancy. The required fields with a red asterisk cannot be omitted. Please be sure to include as much information about room details as possible (e.g., family/individual, gender, etc.)

- Add information about the room, address, and characteristics. Once you are done, select **Save**.
- You will be sent back to the **Vacancies** screen, showing all available vacancies including any recent additions.

To **edit** a vacancy, select the pencil icon next to the vacancy you wish to edit and modify any outstanding information that might have changed. If you wish to **delete** the vacancy, select trash can icon next to the vacancy.

5 Referrals

- The list of clients that have been referred to the current provider is displayed in this section. You may also find referred clients using their **Client ID.** This becomes helpful when you have a long list of referred clients.
- To view or update the referral information, select the **Edit** icon next to the desired referral.

You will get a notification in ClientTrack when a new referral has been sent to your agency. Check the **Notifications** icon to review.