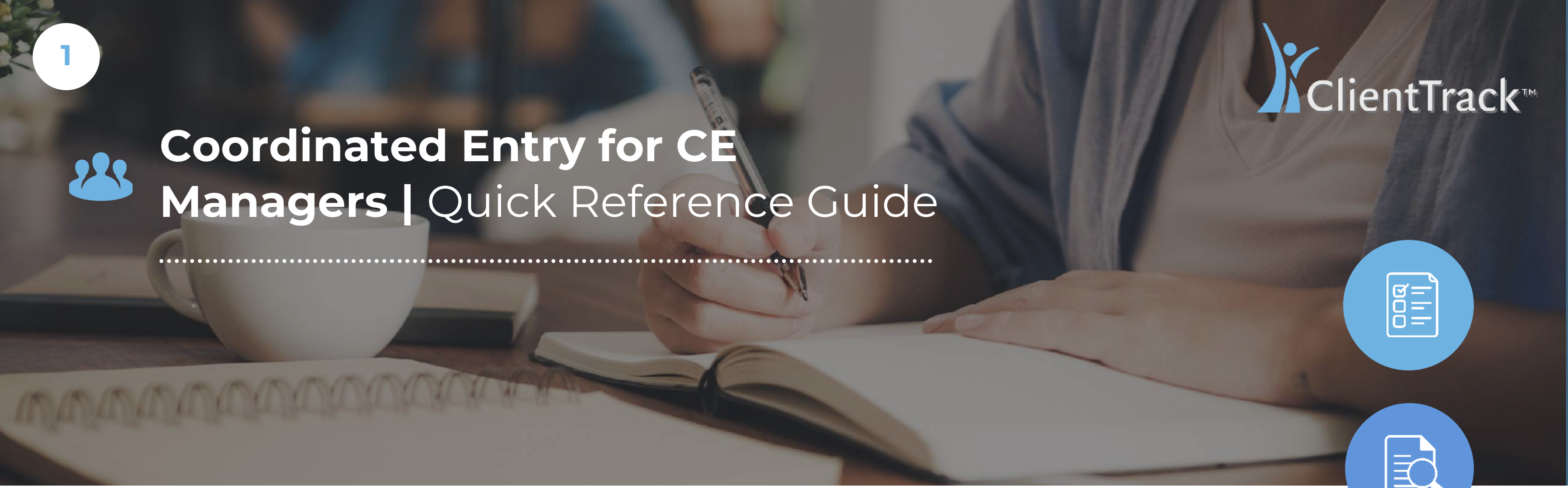

1

Coordinated Entry for CE Managers | 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 Manager.

1 Basic Client Information

- Before initiating a Coordinated Entry workflow or adding a new client record in ClientTrack, always complete a "**Find Client**" search. This will alleviate duplicate client records.
- If no existing HMIS record is found, you may start the **Basic Client Information Assessment.**

Make sure all required fields with a red asterisk* are filled in for:

- **Basic Client Information**
- **Basic Client Demographics**
- **Contact Information**
- **Family Information**

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2 Family Members Assessment

When adding a client, they will appear as **head of household** if they are associated with a family. If it is only your client being enrolled, the system will label the client as "**self**".

- You may search for **existing clients** to add to their household or add **new clients** to the database that need to be associated with your client's household.
- The **Family Member Information Release** section will help you record your client's consent preferences for releasing basic identifying information and project data.

> ***Referrals viewable by other agencies?***
>
> *Based on the client record's restriction, referrals might not be able to be viewed by other agencies. This field lists if referrals will be able to be seen by other agencies, based on the currently selected client restriction setting.*

3 Coordinated Entry Enrollment

To place clients on the Housing Queue, select **Project**.
For Coordinated entry, you may select **North Fulton CE** or **South Fulton CE** from the dropdown list.

Coordinated Entry Enrollment presents the following assessment structure:

- **Universal Data Assessment**: Information related to the selected client's housing status and other relevant information.
- **Triage Assessment**: Assess the client's current situation. The Triage Assessment (VI-SPDAT) is a new assessment implemented with the 2021 HUD Coordinated Entry Data Standards.
- **HMIS Barriers Assessment**: Form used to identify whether a client has each individual barrier or not
- **Financial Assessment**: Indicate the client's sources of monthly income, non-cash benefits and expenses.
- **Document Check**: Document Checklist to see necessary verification items necessary

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4 VI-SPDAT Assessment

VI-SPDAT stands for **Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT).**

The VI-SPDAT is a survey administered both to individuals and families to determine risk and prioritization when providing assistance to homeless and at-risk of homelessness persons.

The tool will automatically calculate the **client's vulnerability** score as each of the answers to each question is completed.

- **For scores 0-3:** No housing intervention
- **For scores 4-7:** An assessment for Rapid Rehousing should be conducted
- **For scores 8 +:** An assessment for Permanent Supportive Housing/Housing First should be conducted.

SCORING SECTION

SECTION	SCORE
PRE-SURVEY	0
A. HISTORY OF HOUSING & HOMELESSNESS	0
B. RISK	0
C. SOCIALIZATION & DAILY FUNCTIONS	0
D. WELLNESS	0
Grand Total	0

Results

Score	Recomendation
0-3	No housing intervention
4-7	An assessment for Rapid Re-Housing
8+	An assessment for Permanent Supportive Housing/Housing First

5 Needs Assessment

After completing enrollment for a client, you can document services associated with the Coordinated Entry enrollment using the "**Needs Assessment**".

Select all **additional services** needed by the Head of Household/client. These services depend upon the Housing Queue availability.

- Financial Assessment
- Rental Assistance
- Job Search Assistance
- Life Skills Training
- Utility - Electricity
- Utility - Gas
- Utility - Water
- Material Goods
- Transportation
- Childcare

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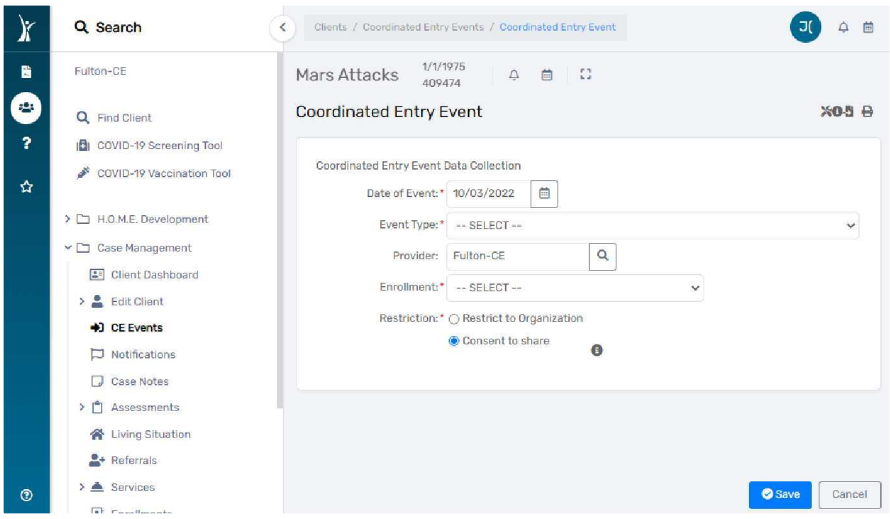
Coordinated Entry in ClientTrack

6 CE Events

- After you have completed a referral, go back to your **Client's Dashboard**.
- Select **Case Management**, then select **CE Event**.
- The next screen you'll see is **Coordinated Entry Events**. Select **Add New**. In this section, you are required to fill out the Coordinated Entry Event. This is how you keep track of client events such as referrals.

Please be sure to enter:

- Date of Event
- Event Type
- Provider
- Enrollment
- Restriction



Once you are done with the last step, you have completed your Coordinated Entry workflow!

Additional Resources

Review the **Coordinated Entry Policy Brief** to find out more information on how the coordinated entry process relates to Homeless Management Information Systems (HMIS).

[View Policy]