

Coordinated Entry HMIS Checklist

- **Enroll** household in **PA-504 Coordinated Entry** and complete Enrollment screen
 - Under *Include group members*, toggle each household member.
 - Project Start Date = date of initial engagement
 - Relationship to Head of Household = select for each household member
 - Prior Living Situation = client provides this information directly; determines chronic homelessness status
 - Disabling Conditions and Barriers = selecting “Yes” for any Condition means “Yes” needs to be selected for “Disabling Condition” field
 - Domestic Violence Victim/Survivor = if “Yes” ensure profile is de-identified (see Your Way Home Operations Manual)
 - Monthly Income and Sources = enter all sources of formal and informal Income amounts
 - Receiving Non-Cash Benefits = Non-Cash Benefits means regular, recurrent benefits; see sources for “Other Non-Cash Benefits”
 - Covered by Health Insurance = if “Yes”, make correct selection
 - Frequently selected options
 - Medicaid = federal and state insurance for income-limited households
 - Medicare = federal insurance for adults ages 65+ or under 65 and have a disability, no matter your income
 - State Health Insurance for Adults = Affordable Care Act marketplace
 - Click “Save” or “Save & Close”
 - If additional Household members, repeat process for each one
- Add **VI-SPDAT** for any client needing referral to RRH or PSH
 - Within the Coordinated Entry program, click on “Assessments”
 - Choose the appropriate Household Assessment
 - Complete and Save the Assessment
 - Click on **Refer Directly to Community Queue**
 - Add Referral Notes if necessary and click on **Send Referral**
- Add a **Coordinated Entry Event** anytime the household contacts Coordinated Entry
 - To add a CE Event (from Client Profile)
 - Click Programs; Open Program “PA-504 Coordinated Entry”
 - Click on “Events”
 - Select the appropriate event and click Save.
- Add **Current Living Situation** anytime direct contact is made with the client
 - To add Current Living Situation (from Client Profile):
 - Click Programs; Open Program “PA-504 Coordinated Entry”

- Click on “Current Living Situation”
- **Exit** from Coordinated Entry program when appropriate:
 - The Household has resolved their homelessness
 - They’ve secured permanent housing
 - They are staying with a family member or a friend
 - They have entered an institutional setting for more than 90 days
 - The Household is discharged from an Emergency Shelter setting for any reason
 - The Household has left the area but remains in their homeless situation
 - If no activity is entered in 90 days, households will be automatically exited from

PA-504 Coordinated Entry Program

- To Exit from a program-
 - From Client Profile click “Programs”
 - Open Program “PA-504 Coordinated Entry”
 - Click “**Exit**” on the top right of the page.
 - Update the information on the Exit page as thoroughly as possible
 - **Note:** this is the same as enrollment
 - Exit Destinations= Where the household is going now
 - “Staying with Friends/Family- Permanent Tenure”= staying somewhere longer than 7 days
 - Do not answer “**Data Not Collected.**” If unable to follow up with a client, select “**No Exit Interview Completed**” instead