

MINNESOTA COORDINATED ENTRY HOUSING PROVIDER INSTRUCTIONS

This document contains data entry instructions for HMIS users that participate in Minnesota’s Coordinated Entry Systems. Depending on the Continuum of Care (CoC), there may be supplemental instructions as well. Questions about entering Coordinated Entry data in HMIS can be directed to the Minnesota HMIS Helpdesk at mnhmis@icalliances.org.

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REFERRAL

When a housing vacancy has been reported to a CoC’s Priority List Manager (PLM), the PLM uses a priority list report to determine who to refer to fill that vacancy. HMIS enables PLMs and housing providers to then communicate about the status of a referral.

ACKNOWLEDGE A HOUSING REFERRAL

When a housing provider learns that they have a pending housing referral, it is important for them to let the Priority List Manager know they have received the referral. In the past, this step has been called "provisional acceptance." As a reminder, the term “client” refers to an individual experiencing homelessness, and that individual may be the member of a household.

Checklist:

- ✓ Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- ✓ Update the client’s referral in the Coordinated Entry Event sub-assessment.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program’s provider.
2. Open the client record of the individual or head of household whose information is being updated. When the **Back Date Mode** pop-up appears, select **Use Current System Date**.
3. Click on the **Entry/Exit** tab and find the Entry/Exit row for the **Coordinated Entry Assessment** provider.
4. Select the **Interims** icon, then click on **Add Interim Review** in the **Interim Reviews** pop-up.

Entry / Exit						
Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
Coordinated Entry Assessment Provider (1353)	01/01/2020					
Entry / Exit		Showing 1-1 of 1				



5. Select the following options in the [Add Interim Review](#) pop-up:
 - a. [Household Members](#): Check the box next to the name of every household member attached to the entry.
 - b. [Interim Review Type](#): Select **Update**.
 - c. [Review Date](#): The date you learned of the housing referral.

Household Members

(234162) Two Parent Family

(1001244)

(1002351)

(1001245)

Interim Review Data

Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update ▼
Review Date *	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="23"/> <input type="button" value="↺"/> <input type="button" value="23"/> <input type="button" value="↻"/>

6. Click on [Save & Continue](#) to proceed to the interim assessment.

UPDATE A CLIENT’S HOUSING REFERRAL

1. In the interim assessment, scroll down to the [Coordinated Entry Event](#) sub-assessment.
 - a. Click on the [magnifying glass](#) to open the sub-assessment pop-up.
 - b. Find the row whose [Date of Event](#) matches your referral’s date, then click on that row’s [edit pencil](#).

Coordinated Entry Event









	Date of Event *	End Date	Event *	Date Referral Acknowledged
	02/20/2020		Referral to RRH project resource opening	

Showing 1-1 of 1



- c. Set the [Date Referral Acknowledged](#) as the date you learned of the housing referral.

answer the following question:

Date Referral Acknowledged	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>    
Referral Result	<input type="text" value="-Select-"/>  
If Unsuccessful, Reason	<input type="text" value="-Select-"/>  

- Click on **Save** when you are finished making updates.
- Scroll down to the bottom of the assessment and select **Exit** to close it.

MARK A REFERRAL AS SUCCESSFUL

When a client is being enrolled in a housing program, their referral should be marked as “successful.”

Checklist:

- Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- Update the client’s referral in the Coordinated Entry Event sub-assessment.
- Add a new row to the Current Living Situation sub-assessment.
- Enroll the client in your housing program by creating a new Entry/Exit for your housing provider.
- Fill out an entry assessment for the client.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

- Click on **Enter Data As** and select your housing program’s provider.
- Open the client record of the individual or head of household whose information is being updated. When the **Back Date Mode** pop-up appears, select **Use Current System Date**.
- Click on the **Entry/Exit** tab and find the Entry/Exit row for the [Coordinated Entry Assessment](#) provider.



- Select the **Interims** icon, then click on **Add Interim Review** in the **Interim Reviews** pop-up.

Entry / Exit						
Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
ICA-Coordinated Entry Assessment-Training Provider (1353)	01/01/2020					
Entry / Exit		Showing 1-1 of 1				

- Select the following options in the **Add Interim Review** pop-up:
 - Household Members:** Check the box next to the name of every household member attached to the entry.
 - Interim Review Type:** Select **Update**.
 - Review Date:** The date the referral was successful.

Household Members

(234162) Two Parent Family

- (1001244)
- (1002351)
- (1001245)

Interim Review Data

Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update
Review Date *	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="text"/> : <input type="text"/> : <input type="text"/> <input type="text"/>

- Click on **Save & Continue** to proceed to the interim assessment.

UPDATE A CLIENT’S HOUSING REFERRAL

- In the interim assessment, scroll down to the **Coordinated Entry Event** sub-assessment.
- Click on the **magnifying glass** to open the sub-assessment pop-up.



- Find your referral’s row and click on the **edit pencil**.

	Date of Event *	End Date	Event *	Date Referral Acknowledged
	02/20/2020		Referral to RRH project resource opening	02/20/2020

Add Showing 1-1 of

- In the event pop-up, fill out the following:
 - Referral Result:** Select **Successful referral: client accepted**.
 - Date of Result:** Enter the date the referral was successful.

Housing Agency's Response to Housing Referral

Date Referral Acknowledged: 02 / 27 / 2020

Referral Notes:

Referral Result: -Select-

If Unsuccessful, Reason: -Select-

Date of Result: / /

- Click on **Save** when you are done updating the referral.

UPDATE A CLIENT’S CURRENT LIVING SITUATION


- In the interim assessment, scroll down to the **Current Living Situation** sub-assessment.

	Information Date *	Current Living Situation	Living situation verified by
	02/01/2020	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)	(1353) ICA Coordinated Entry Assessment Training Provider

Add Showing 1-2 of 2



- a. Click on the **magnifying glass** to open the sub-assessment pop-up.
- b. If there is an old row without an **End Date**, click on that row's **edit pencil**. In the Edit Recordset pop-up, enter an **End Date** that is **one day before** the referral was successful, then select **Save**.

Current Living Situation					
	Provider	Start Date ▼	End Date	Information Date	
	ICA-Coordinated Entry Assessment-Training Provider (1353)	02/01/2020		02/01/2020	
Add					Showing 1-1

2. Click on **Add** and fill out the following fields:
 - a. **Start Date**: Enter the date the referral was successful.
 - b. **Information Date**: Same as the **Start Date**.
 - c. **Location Details**: [Optional] Enter more detail about the client's location.
 - d. **Current Living Situation**: Select the most accurate option.
 - e. **Living Situation verified by**: Click on **Lookup**, then select your housing program's provider.
 - f. **Conditional Questions**: Depending on the answer selected for **Current Living Situation**, you may need to answer additional questions.

The following questions are only required for clients in Institutional, Temporary, and Permanent Current Living Situations.

Is client going to have to leave their current living situation within 14 days? **G**

If 'Yes' to 'Is client going to have to leave their current living situation

Has a subsequent residence been identified? **G**

Does individual or family

**Read the green helper text carefully to decide if additional questions need to be answered.*

3. Click on **Save** when you are done recording the **Current Living Situation**.
4. Scroll to the bottom of the interim assessment and select **Exit** to close it.



ENROLL A CLIENT IN A HOUSING PROGRAM

1. Click on **Enter Data As** and select your housing program’s provider.
2. Open the client record of the individual or head of household being enrolled in your housing program. When the **Back Date Mode** pop-up appears, select **Use Current System Date**.
3. Click on the **Entry/Exit** tab, then select **Add Entry/Exit**.
4. Select the following options in the **Project Start Data** pop-up:
 - a. **Household Members**: Check the box next to the name of every household member who will be attached to the entry.
 - b. **Provider**: Your housing provider.
 - c. **Type**: Select your provider’s entry type.
 - d. **Project Start Date**: The date the client was enrolled in your housing program.

Household Members

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

(234789) Female Single Parent

(1) [REDACTED]

(1106626) [REDACTED]

(1081029) [REDACTED]

Project Start Data - (1) Phoenix, The

Provider *	ICA-ES-HCC-DHS-OEO-ESP-Training Provider (1410)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
Type *	-Select-			
Project Start Date *	<input type="text"/> / <input type="text"/> / <input type="text"/>			

5. Click on **Save & Continue** to proceed to your housing program’s entry assessment.

FILL OUT AN ENTRY ASSESSMENT

1. Fill out the entry assessment as accurately and completely as possible, paying special attention to the following:

HOUSEHOLDS

Complete the entry assessment for **all** members of the household.







EXISTING ASSESSMENT DATA

If the client has worked with other homeless service agencies before, data may already appear in the assessment. Review any existing assessment data and update information that is no longer accurate.

HOUSING MOVE-IN DATE

If the client moved into housing on the same day that they were enrolled in your housing program, record a [Housing Move-In Date](#). Then, refer to the section [Remove a Client from the Priority List](#) for instructions on removing the housed client from the Priority List.

(Permanent Housing Projects Only) For Heads of Household in Permanent Housing Projects (RRH, PSH, PH S, PH O)

Housing Move-in Date / /    

2. Scroll down to the bottom of the assessment and select **Save & Exit** when you are finished entering data.

MARK A REFERRAL AS UNSUCCESSFUL

When a housing provider or client rejects a referral, the referral should be marked as “unsuccessful.” In many cases, the client should be returned to the Priority List when a referral is unsuccessful. However, if a housing provider knows that the client should not be considered for future housing placements, they should remove the client from the Priority List. See the section [Remove a Client from the Priority List](#) for instructions.

Checklist:

- Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- Update the client’s referral in the Coordinated Entry Event sub-assessment.
- Add a new row to the Current Living Situation sub-assessment.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program’s provider.
2. Open the client record of the individual or head of household whose information is being updated. When the [Back Date Mode](#) pop-up appears, select **Use Current System Date**.



3. Click on the [Entry/Exit](#) tab and find the Entry/Exit row for the [Coordinated Entry Assessment](#) provider.
4. Select the [Interims](#) icon, then click on [Add Interim Review](#) in the [Interim Reviews](#) pop-up.

Entry / Exit						
Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
ICA-Coordinated Entry Assessment Provider (1353)	01/01/2020					
Entry / Exit		Showing 1-1 of 1				

5. Select the following options in the [Add Interim Review](#) pop-up:
 - a. [Household Members](#): Check the box next to the name of every household member attached to the entry.
 - b. [Interim Review Type](#): Select [Update](#).
 - c. [Review Date](#): The date the new information was reported.

Household Members

(234162) Two Parent Family

- (1001244)
- (1002351)
- (1001245)

Interim Review Data

Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update ▼
Review Date *	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="text"/> : <input type="text"/> : <input type="text"/> <input type="text"/>

6. Click on [Save & Continue](#) to proceed to the interim assessment.

UPDATE A CLIENT'S HOUSING REFERRAL

1. In the interim assessment, scroll down to the [Coordinated Entry Event](#) sub-assessment.



2. Find your referral's row and click on the **edit pencil**.

	Date of Event *	End Date	Event *	Date Referral Acknowledged
	02/20/2020		Referral to RRH project resource opening	02/20/2020

Add Showing 1-1 of

3. In the event pop-up, fill out the following:
 - a. **Referral Result:** Select the **Unsuccessful referral** answer that is most accurate.
 - b. **If Unsuccessful, Reason:** Select the most accurate option. Choose a “Declined” answer when returning a client to the priority list and a “Canceled” answer when removing them from the Priority List.
 - c. **Date of Result:** Enter the date the referral was unsuccessful.

Housing Agency's Response to Housing Referral

Date Referral Acknowledged	02 / 27 / 2020
Referral Notes	
Referral Result	-Select-
If Unsuccessful, Reason	-Select-
Date of Result	

4. Click on **Save** when you are done updating the referral.



UPDATE A CLIENT’S CURRENT LIVING SITUATION

1. Scroll down to the [Current Living Situation](#) sub-assessment.

Current Living Situation			
	Information Date *	Current Living Situation	Living situation verified by
	02/01/2020	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)	(1353) ICA Coordinated Entry Assessment Training Provider
Add		Showing 1-2 of 2	

- a. If there is an old row without an [End Date](#), click on that row’s [edit pencil](#). In the Edit Recordset pop-up, enter an [End Date](#) that is one day **prior to** the [Date of Result](#), then select Save.
2. Click on [Add](#) and fill out the following fields:
 - a. [Start Date](#): Enter the date the referral was successful.
 - b. [Information Date](#): Same as the [Start Date](#).
 - c. [Location Details](#): [Optional] Enter more detail about the client’s location.
 - d. [Current Living Situation](#): Select the most accurate option.
 - e. [Living Situation verified by](#): Click on [Lookup](#), then select your housing program’s provider.
 - f. [Conditional Questions](#): Depending on the answer selected for [Current Living Situation](#), you may need to answer additional questions.


The following questions are only required for clients in Institutional, Temporary, and Permanent Current Living Situations.

Is client going to have to leave their current living situation within 14 days? Yes (HUD) G

If 'Yes' to 'Is client going to have to leave their current living situation

Has a subsequent residence been identified? Client doesn't know (HUD) G

Does individual or family



**Read the green helper text carefully to decide if additional questions need to be answered.*



3. Click on **Save** when you are done recording the [Current Living Situation](#).
4. Scroll to the bottom of the interim assessment and select **Exit** to close it.

REMOVE A CLIENT FROM THE PRIORITY LIST

In certain circumstances, a housing provider may remove a client from the Priority List because they are no longer considered to be eligible for a placement in homeless-dedicated housing.

Checklist:

- ✓ Add exit data to the Coordinated Entry Assessment Entry/Exit.
- ✓ Fill out the exit assessment as completely and accurately as possible.

ADD EXIT DATA

1. Click on **Enter Data As** and select your housing program’s provider.
2. Open the record of the client being removed from the Priority List. When the [Back Date Mode](#) pop-up appears, select **Use Current System Date**.
3. Click on the **Entry/Exit** tab and find the Entry/Exit row for the [Coordinated Entry Assessment](#) provider.
4. Select the **edit pencil** next to the empty [Exit Date](#) field.

Entry / Exit							
Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count		
Coordinated Entry Assessment Provider (1353)	01/01/2020						
Entry / Exit		Showing 1-1 of 1					

5. Fill out the following fields in the [Edit Exit Data](#) pop-up:
 - a. [Household Members](#): Check the box next to the name of every household member.
 - b. [Exit Date](#): The date that the client is being removed from the Priority List.
 - c. [Destination](#): Select the most accurate answer.



Household Members




(234162) Two Parent Family

(1001244) [REDACTED]

(1002351) [REDACTED]

(1001245) [REDACTED]

Edit Exit Data - (1001244) [REDACTED]

Exit Date *	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>    <input type="text" value=""/> : <input type="text" value=""/> : <input type="text" value=""/> <input type="text" value=""/>
Reason for Leaving	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
Destination *	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>

6. Click on **Save & Continue** to proceed to the exit assessment.

FILL OUT AN EXIT ASSESSMENT

1. Fill out the assessment as accurately and completely as possible, paying special attention to the following:

HOUSEHOLDS

Update the assessment for the head of household **only**.

EXISTING ASSESSMENT DATA

If the client has worked with other homeless service agencies before, data may already appear in the assessment. Review any existing assessment data and update information that is no longer accurate.

2. Select **Save & Exit** at the bottom of the assessment when you are finished entering data.



HOUSING OUTCOME

After a referral has been marked as successful and a client has been enrolled in a housing program, it is the housing provider’s responsibility to record either that a client has been housed, or that they were exited from the program without being housed.

SHOW THAT A CLIENT HAS BEEN HOUSED

Checklist:

- ✓ Add an interim update to the housing program Entry/Exit.
- ✓ Record a Housing Move-In Date.
- ✓ Add exit data to the Coordinated Entry Assessment Entry/Exit.
- ✓ Fill out the exit assessment as completely and accurately as possible.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program’s provider.
2. Open the client record of the individual or head of household whose information is being updated. When the **Back Date Mode** pop-up appears, select **Use Current System Date**.
3. Click on the **Entry/Exit** tab and find the Entry/Exit row for your housing program’s provider.
4. Select the **Interims** icon, then click on **Add Interim Review** in the **Interim Reviews** pop-up.

	Type	Project Start Date	Exit Date	Interims	Follow Ups	Clie Cou
Provider (1917)	Basic	07/01/2019		2		
g Provider (3410)	Basic	06/30/2019		5		

5. Select the following options in the **Add Interim Review** pop-up:
 - a. **Household Members**: Check the box next to the name of every household member attached to the entry.
 - b. **Interim Review Type**: Select **Update**.
 - c. **Review Date**: The date the client moved into housing.



Household Members

(234162) Two Parent Family

- (1001244) _____
- (1002351) _____
- (1001245) _____

Interim Review Data

Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update ▼
Review Date *	<input type="text"/> / <input type="text"/> / <input type="text"/> 📅 ↺ 📅

6. Click on **Save & Continue** to proceed to the interim assessment.

RECORD A HOUSING MOVE-IN DATE

1. In the interim assessment, find the **Housing Move-In Date** field and enter the date that the client moved into housing.

(Permanent Housing Projects Only) For Heads of Household in Permanent Housing Projects (RRH, PSH, PH S, PH O)

Housing Move-in Date / /
📅 ↺ 📅

2. Scroll down to the bottom of the assessment and select **Save & Exit** to close it.

ADD EXIT DATA

1. In the **Entry/Exit** tab, find the row for the **Coordinated Entry Assessment** provider.
2. Select the **edit pencil** next to the empty **Exit Date** field.

Entry / Exit						
Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
ICA-Coordinated Entry Assessment Provider (1353)	01/01/2020	✎ ←	📄 1	📄	🔍 3	📎
Entry / Exit		Showing 1-1 of 1				



3. Fill out the following fields in the [Edit Exit Data](#) pop-up:
 - a. [Household Members](#): Check the box next to the name of every household member.
 - b. [Exit Date](#): The date that the client is being removed from the priority list.
 - c. [Destination](#): Select the most accurate answer.

The screenshot shows a web form with two main sections. The first section, titled "Household Members", has a green header bar and contains a list of family members. Each member has a checkbox to its left. The second section, titled "Edit Exit Data - (1001244)", also has a green header bar and contains several input fields: "Exit Date *" with a date picker, "Reason for Leaving" with a dropdown menu, "If \"Other\", Specify" with a text box, and "Destination *" with a dropdown menu. The "Destination *" dropdown is highlighted in yellow.

4. Click on [Save & Continue](#) to proceed to the exit assessment.

FILL OUT AN EXIT ASSESSMENT

1. Fill out the assessment as accurately and completely as possible, paying special attention to the following:

HOUSEHOLDS

Update the assessment for the head of household only.

EXISTING ASSESSMENT DATA

If the client has worked with other homeless service agencies before, data may already appear in the assessment. Review any existing assessment data and update information that is no longer accurate.

2. Select [Save & Exit](#) at the bottom of the assessment when you are finished entering data.



SHOW THAT A CLIENT STILL NEEDS HOUSING

When a client was exited from a program without being housed and wants to continue to participate in Coordinated Entry, follow the directions below to return them to the Priority List.

Checklist:

- ✓ Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- ✓ Update the client’s referral in the Coordinated Entry Event sub-assessment.
- ✓ Add exit data to the housing program Entry/Exit.
- ✓ Fill out the exit assessment as completely and accurately as possible.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program’s provider.
2. Open the client record of the individual or head of household whose information is being updated. When the **Back Date Mode** pop-up appears, select **Use Current System Date**.
3. Click on the **Entry/Exit** tab and find the Entry/Exit row for the **Coordinated Entry Assessment** provider.
4. Select the **Interims** icon, then click on **Add Interim Review** in the **Interim Reviews** pop-up.

Entry / Exit						
Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
Coordinated Entry Assessment Provider (1353)	01/01/2020		📄 1	📄	🔍 3	📎
Entry / Exit		Showing 1-1 of 1				

5. Select the following options in the **Add Interim Review** pop-up:
 - a. **Household Members**: Check the box next to the name of every household member.
 - b. **Interim Review Type**: Select **Update**.
 - c. **Review Date**: The date the client is being returned to the Priority List.



Household Members

(234162) Two Parent Family

- (1001244) [blurred]
- (1002351) [blurred]
- (1001245) [blurred]

Interim Review Data

Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update ▼
Review Date *	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> 📅 ↺ 📅

- Click on **Save & Continue** to proceed to the interim assessment.

UPDATE A CLIENT’S HOUSING REFERRAL

- In the interim assessment, scroll down to the **Coordinated Entry Event** sub-assessment.
- Find your referral’s row and click on the **edit pencil**.

Coordinated Entry Event

	Date of Event *	End Date	Event *	Date Referral Acknowledged
	02/20/2020		Referral to RRH project resource opening	02/20/2020

Showing 1-1 of

- In the event pop-up, add an **End Date** and click on **Save**. Do not make any other updates to the referral.
- Scroll to the bottom of the interim assessment and select **Exit** to close it.

EXIT A CLIENT FROM A HOUSING PROGRAM

- In the **Entry/Exit** tab, find the row created for your housing provider.
- Select the **edit pencil** next to the empty **Exit Date** field.



	Type		Project Start Date	Exit Date	Interims	Follow Ups	Client Cou
Provider (1917)	Basic		07/01/2019		2		
g Provider (3410)	Basic		06/30/2019		5		

3. Fill out the following fields in the [Edit Exit Data](#) pop-up:
 - a. [Household Members](#): Check the box next to the name of every household member.
 - b. [Exit Date](#): The date that the client exited your program.
 - c. [Destination](#): Select the most accurate answer.

Household Members

(234162) Two Parent Family

- (1001244)
- (1002351)
- (1001245)

Edit Exit Data - (1001244)

Exit Date *	<input type="text"/> / <input type="text"/> / <input type="text"/>
Reason for Leaving	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
Destination *	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>

4. Click on [Save & Continue](#) to proceed to the exit assessment.

FILL OUT AN EXIT ASSESSMENT

1. Fill out the assessment as accurately and completely as possible, paying special attention to the following:

HOUSEHOLDS

Update the assessment for all household members.



EXISTING ASSESSMENT DATA

If the client has worked with other homeless service agencies before, data may already appear in the assessment. Review any existing assessment data and update information that is no longer accurate.

2. Select **Save & Exit** at the bottom of the assessment when you are finished entering data.

REMOVE A CLIENT FROM THE PRIORITY LIST






When a client was exited from a program without being housed and will not be participating in Coordinated Entry any longer, follow the directions below to remove them from the Priority List.

Checklist:

- ✓ Add exit data to the Coordinated Entry Assessment Entry/Exit.
- ✓ Fill out the exit assessment as completely and accurately as possible.

ADD EXIT DATA

1. Click on **Enter Data As** and select your housing program’s provider.
2. Open the record of the client being removed from the Priority List. When the **Back Date Mode** pop-up appears, select **Use Current System Date**.
3. Click on the **Entry/Exit** tab and find the Entry/Exit row for the **Coordinated Entry Assessment** provider.
4. Select the **edit pencil** next to the empty **Exit Date** field.

Entry / Exit						
Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
Coordinated Entry Assessment Provider (1353)	01/01/2020					
Entry / Exit		Showing 1-1 of 1				

5. Fill out the following fields in the **Edit Exit Data** pop-up:
 - a. **Household Members**: Check the box next to the name of every household member.
 - b. **Exit Date**: The date that the client is being removed from the Priority List.
 - c. **Destination**: Select the most accurate answer.



Household Members

(234162) Two Parent Family

- (1001244) [blurred]
- (1002351) [blurred]
- (1001245) [blurred]

Edit Exit Data - (1001244) [blurred]

Exit Date *	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> <input type="button" value="23"/> <input type="button" value="23"/> <input type="button" value="23"/>
Reason for Leaving	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
Destination *	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>

- Click on **Save & Continue** to proceed to the exit assessment.

FILL OUT AN EXIT ASSESSMENT

- Fill out the assessment as accurately and completely as possible, paying special attention to the following:

HOUSEHOLDS

Update the assessment for the head of household **only**.

EXISTING ASSESSMENT DATA

If the client has worked with other homeless service agencies before, data may already appear in the assessment. Review any existing assessment data and update information that is no longer accurate.

- Select **Save & Exit** at the bottom of the assessment when you are finished entering data.

