Coordinated Entry Intake Instructions

1. Log in to ServicePoint.
2. If your default is not set to Coordinated Entry, click **Enter Data As (EDA)** and select your agency's **-[Provider Name] -Coordinated Entry** program.
3. Click on **ClientPoint** from the list of menu options on the left side of the screen.
4. **Search for the Client.** Common practices include a **Search** by Client's First Name, Last Name, and/or Social Security Number. **You MUST search for the client**.
5. If the Client has an Active HMIS ID, the Client's name will appear in the Search Results at the bottom of the screen. Click on the Client's name to open their Profile.
   - For **New Clients**: If the Client is a New Client, fill out the remaining fields and select **add new client with this information.**
6. In the Client Profile, select the ROI tab. Click on **Add Release of Information** button in lower left corner. Enter **Start Date** and **End Date**, the **End Date** is **2 years** from the date the ROI is signed. Select appropriate response for Documentation, enter your name in the Witness field, and click on **Save Release of Information**. You **must scan & upload.**
7. **Begin the entry/exit process.** If the Client is an existing Client, check the **Entry/Exit** field to ensure the Client has not already been entered into a **Coordinated Entry** project.
   - **Important:** If the client has already been entered into **Coordinated Entry**, make sure client's contact information is correct in **HMIS**, let them know their follow-up has been noted and ask them how you can assist them in the interim.
8. If the Client does not have an **Entry/Exit** for a **Coordinated Entry**, or is a New Client, begin the coordinated entry Process. In the **Project Start Date** box: If Client is a member of a Household (e.g. Two Parent Family, Female Single Parent, etc.), remember to check **ONLY** the **client's name** under the household members section.
9. Select Provider as **[Provider Name] -Coordinated Entry** and the select **HUD** as the type. **Save and Continue.**
10. If Client is an Existing Client, **VERIFY** and **UPDATE all information.** If client is new, complete all fields in the Intake, adhering to the **4 C's** of data collection: **Correct, Current, Consistent, and Complete.**
11. For the client's **Current Living Situation** sub assessment. The **Start Date, End Date, and Information Date** will be the same date and the date of coordinated entry intake. The **Current Living Situation** will be where the client is currently staying. The **Living Situation Verified by** will be **your agency's Coordinated Entry** project. If the client is in a **literally homeless** situation, the answer to "Is client going to have to leave.." will be **No.**
12. Select and complete appropriate **VI-SPDAT** (adult, family, youth) with Client. Client ***MUST*** have at least one **VI-SPDAT** on file. VI-SPDATs can be administered more than once if there has been a significant change in client acuity, but ideally in no sooner than six-week intervals.

13. Add the client's **Coordinated Entry Assessment.** The **Date of Assessment and End Date** will be the **same date** as the coordinated entry intake. The **Assessment Location** is your agency's **Coordinated Entry Program** name. The **Assessment Type** is either **In Person, Virtual, or Phone.** The **Assessment Level** is **Housing Needs Assessment.** The **Prioritization Status** is **Placed on Prioritization List.**

14. Add the client's **Coordinated Entry Event.** The **Start Date, End Date, Date of Event** will be the same date. Click the calendar with the **green check** to auto populate calendar date. Select **Referral to Housing Navigation Project or Services** from the Event Drop-down list and **save.**

15. **Save & Exit.**

Coordinated Entry Interim Instructions

1. Log into HMIS
2. If your default is not set to Coordinated Entry, click **Enter Data As (EDA)** and select your agency's **-[Provider Name] -Coordinated Entry** program.
3. Click on **ClientPoint** from the list of menu options on the left side of the screen.
4. **Search for the Client.** Common practices include a **Search** by Client's First Name, Last Name, and/or Social Security Number. **.**
5. Client's name will appear in the Search Results at the bottom of the screen. Click on the Client's name to open their Profile.
6. Select the **Entry/Exit** Tab.
7. Click on the Checklist icon,  , to create an Interim for the open Coordinated Entry program entry.
8. Click **"Add Interim Review."**
9. **S**elect **"Update"** from the Interim Review Type drop down list.
10. Save & Continue.
11. **VERIFY** and **UPDATE all information.**
    a) Complete the Intake adhering to the **4 C's** of data collection: **Correct, Current, Consistent, and Complete.**
12. For the client's **Current Living Situation** sub assessment. The **Start Date, End Date, and Information Date** will be the same date and the date of coordinated entry intake. The **Current Living Situation** will be where the client is currently staying. The **Living Situation Verified by** will be **your agency's Coordinated Entry** project. If the client is in a **literally homeless** situation, the answer to "Is client going to have to leave." will be **No.**
13. Select and complete appropriate **VI-SPDAT** (adult, family, youth) with Client. Client ***MUST*** have at least one **VI-SPDAT** on file. VI-SPDATs can be administered more than once if there has been a significant change in client acuity, but ideally in no sooner than 6 months to a year intervals.