BOS Coordinated Entry SSO Workflow
FY2018-2019

The following workflow should be completed on the **HARA Screening** page

!!IMPORTANT PREREQUISTE NOTICE!!:
This workflow requires that users have a FIRM understanding of the ClientPoint Module as well as basic ServicePoint functionality. Individuals who are either new to the system or are unfamiliar with any aspect of those things mentioned above MUST complete the appropriate prerequisite training before continuing. Please see www.mihomeless.org for more information.

Screening Interview
Complete with all households experiencing a housing crisis

1. Select the **HARA Screening provider page** using **Enter Data As** (if necessary)

2. Use **Back Date** function to record data captured on a previous date (if necessary)

3. **Search for Existing Client** (Add new client only when necessary)

   IF you have the client's **SSN** add that information, otherwise enter 'Data Not Collected' in the **SSN Data Quality** field on the **Client Search Screen.** A System Administrator may enter this information at a later date.

4. Create/Edit **Household** (if applicable) – *See Household Addendum' for more information.*

5. Add **ROI**/Lock Record if necessary – *See 'Securing Client Records Addendum' for more information.*

6. Complete **HARA Screening Assessment (on the Client Profile tab)** for all household members

   IMPORTANT: Answer **new Household Type question** (Head of Household Only)

7. Add **Case/Care Mgt**. **Service Transaction**.

   - **Start/End Date** = Initial Screening Date. *See 'Service Transaction Addendum' for more information.*

*** If Client is not Category 1 Homeless =** End of Coordinated Entry SSO Workflow

**** If Client is Category 1 Homeless =** Schedule Intake Interview (and proceed with Coordinated Entry SSO Intake)

BOS Coordinated Entry SSO Intake

Complete with Category 1 Homeless households only

Creating a Project Enrollment in HMIS

1. Select the **HARA Screening provider page** using **Enter Data As** (if necessary)

2. Use **Back Date** function to record data captured on a previous date (if necessary).

3. **Search for Existing Client** (Add new client only when necessary)

4. **Add Entry/Exit (Located under the Entry/Exit Tab)**

    - Include all household members in project entry
    - **Entry Type** = HUD
    - **Entry Date** = Intake date
    - **Complete** the **MSHMIS CoC Intake** assessment questions for **ALL HH members**
    - **Complete VI-SPDAT** assessment on the head of household's record (if one has not already been completed)

NOTE: If Client is assessed and may be receiving additional coordinated entry services (i.e. case management, transportation, housing search assistance, etc.), keep the client record open until client is no longer receiving services.

Discharging/Exiting Clients from HMIS

5. Select the **HARA Screening provider page** using **Enter Data As** (if necessary)

6. Use **Back Date** function to record data captured on a previous date (if necessary)

7. Click on the **Entry/Exit Tab**

8. Click the **edit pencil** next to the **Exit Date**

    - Include all household members in project exit
    - **Exit Date** = (see below)
        - ➢ If Client is assessed, immediately referred to another housing project and will not be receiving any further assistance from the BOS Coordinated Entry SSO project (**Exit Date** = **1 Day After Project Start Date)**
          Note: The Exit Date can be postdated in ServicePoint

        - ➢ If Client was receiving additional coordinated entry services (i.e. case management, transportation, housing search assistance, etc) but those services will no longer be provided (**Exit Date = Date last service was provided**)

        - ➢ Any client who has not been in contact with the project for more than 90 days should be exited. (**Exit Date = Date last service was provided**)

    - **Reason for Leaving and Destination** must be completed.

    - **IMPORTANT**: Complete/update the "**Assessment Disposition'** Exit Question **(Head of Household Only)**

- Update any other information that may have changed since project entry