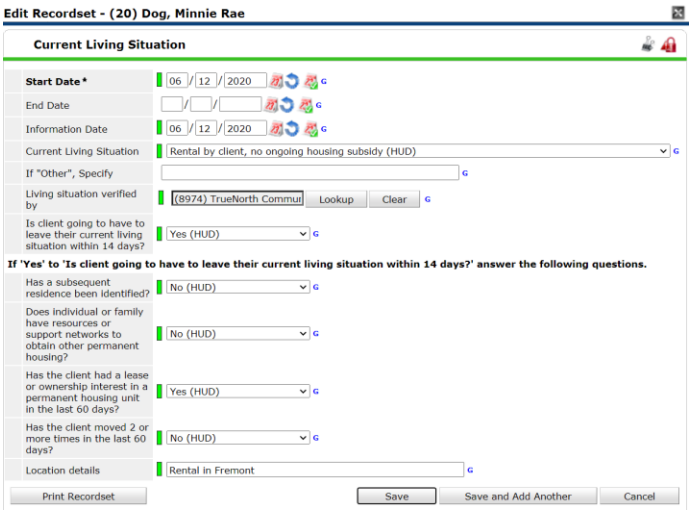
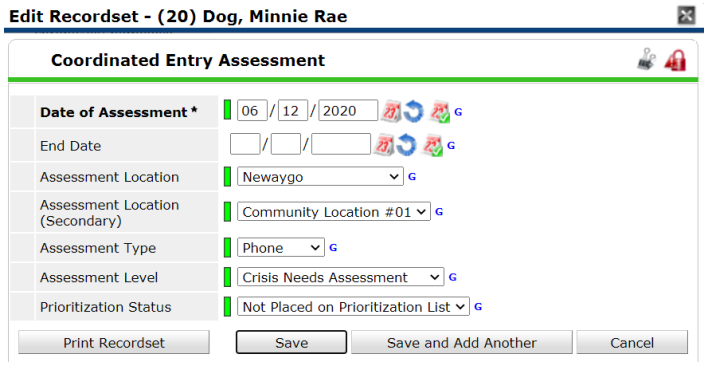
# TrueNorth Coordinated Entry Workflow

## At-risk or stably housed

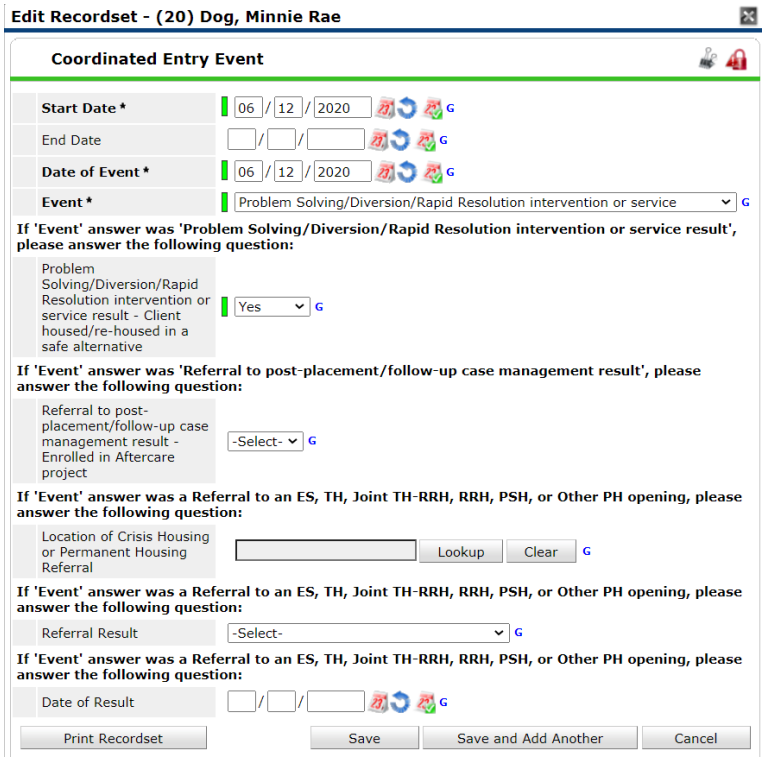
1. Enter data as into the **Coordinated Entry Provider Page – Region 4 Coordinated Entry (County)**
2. Use **Back Date** function if data was captured on a previous date
3. **Search for client** (add new if need be)
4. **Manage/ Create Household** *Located under households tab
5. Add **ROI**/ Lock profile if requested by client * for locking a profile please see System Admin with guidance on this *Upload ROI to client profile
6. **Add Entry** *Located under entry exit tab
    - **Entry Type**= HUD
    - **Entry Date** = The date you completed the COC Entry
    - **Add ROI Outreach Sharing Plan Sub-Assessment for HOH**
    - **Complete** the **MSHMIS Coordinated Entry <u>if</u> Community Partner <u>if</u> TrueNorth complete COC Intake** questions for all household members.
    - **Complete Current Living Situation** question for **HOH**



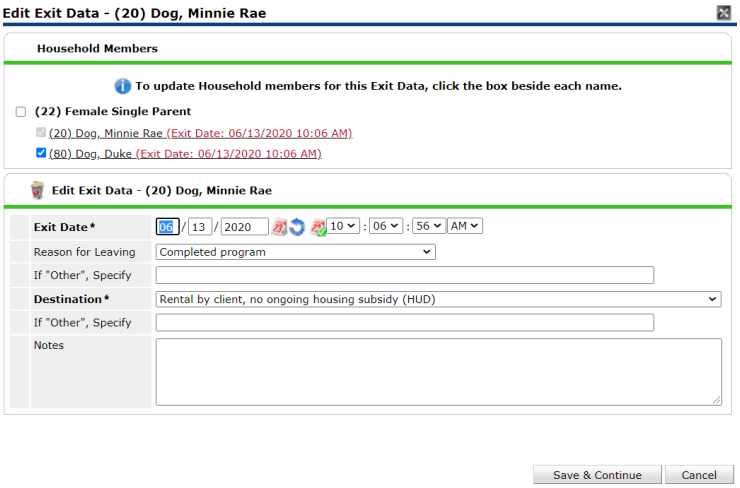

- **Add Coordinated Entry Assessment** (4.19 sub assessment) for **<u>HOH</u>**



- Client is Diverted because of housing status = Record Problem Solving Result and Close Record
- **Complete Coordinated Entry Event** (4.20 Sub Assessment) for **HOH**



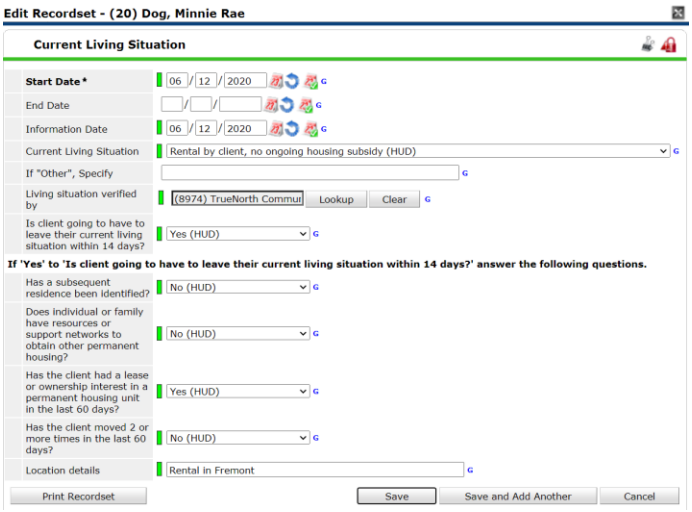

- Add note on client profile page for in regards to your CE Intake
- Add Case Care Management service transaction to indicate you completed CE Intake
- **Complete Client Exit** on <u>all</u> Household members = Entry Date + 1
  **If using foundation funds/ non discretionary funds and client is not Cat 1 or 2. Please exit the client once the rent is paid and rent payment service transaction has been complete.



## Category 2 Imminently Homeless

7. Enter data as into the **Coordinated Entry Provider Page – Region 4 Coordinated Entry (County)**

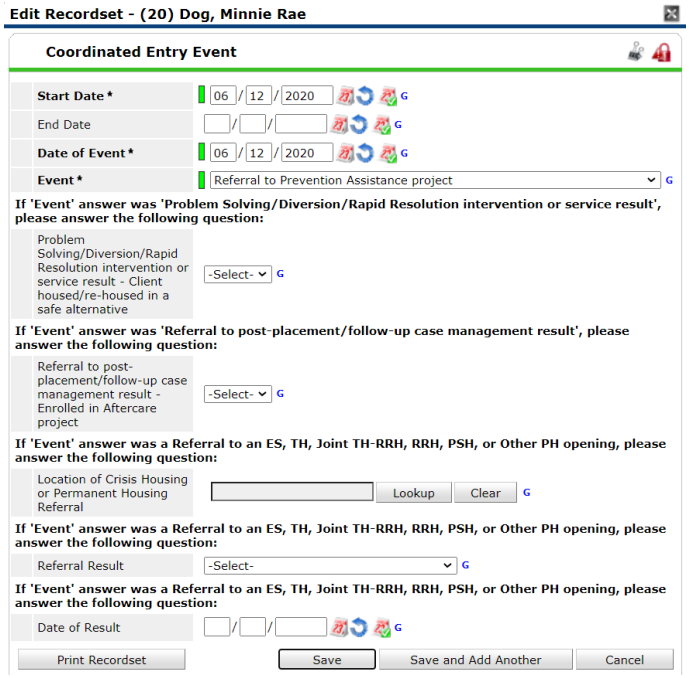
1. Use **Back Date** function if data was captured on a previous date
2. **Search for client** (add new if need be)
3. **Manage/ Create Household** *Located under households tab
4. Add **ROI**/ Lock profile if requested by client * for locking a profile please see System Admin with guidance on this *Upload ROI to client profile
5. **Add Entry** *Located under entry exit tab
    - **Entry Type**= HUD
    - **Entry Date** = The date you completed the intake (COC Entry)
    - **Complete** the **MSHMIS Coordinated Entry <u>if</u> Community Partner <u>if</u> TrueNorth complete COC Entry** questions for all household members.
    - **Complete Current Living Situation** question for **HOH**



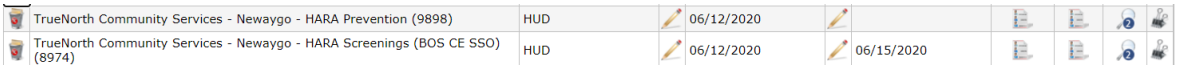

- **Add Coordinated Entry Assessment** (4.19 sub assessment) for **<u>HOH</u>**

- Client is eligible for Prevention Service = Record Referral to Prevention Assistance Project Event

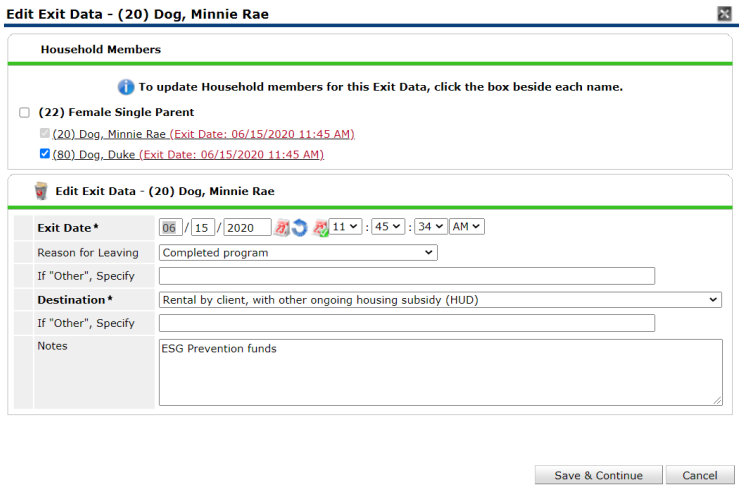
- **Complete Coordinated Entry Event** (4.20 Sub Assessment) for **HOH**




- Add note on client profile page for in regards to your CE Intake
- Add Case Care Management service transaction to indicate you completed CE Intake
- When client enrolls into ESG Prevention add an Entry/Exit. ** You will have an open entry in both coordinated entry and ESG Prevention.

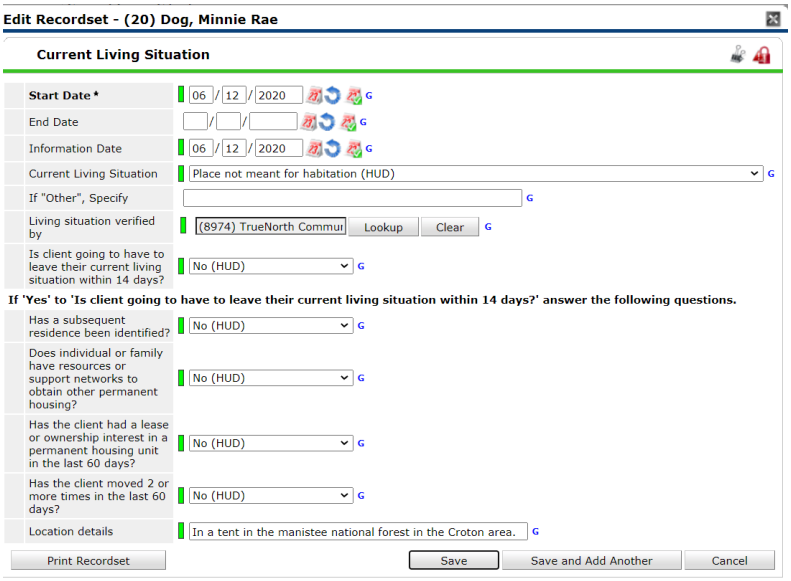



- **Once back rent or housing crisis is solved Complete Client Exit** on all Household members. You will need to EDA into the CE page and complete the exit for the CE Entry.

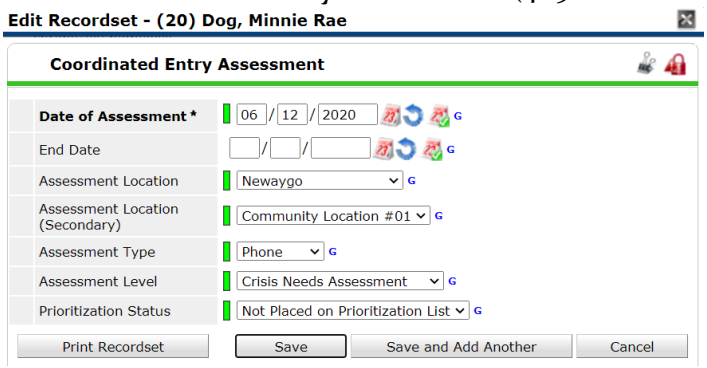


## Category 1 Homeless

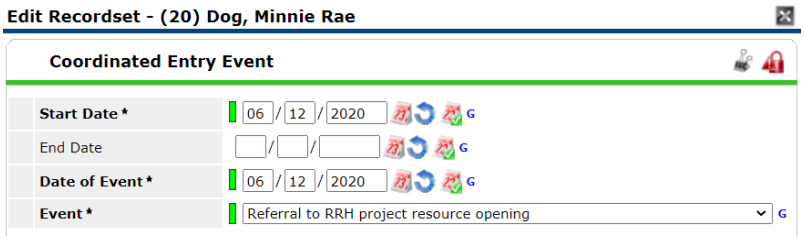
8. Enter data as into the **Coordinated Entry Provider Page – Region 4 Coordinated Entry (County)**
2. Use **Back Date** function if data was captured on a previous date
3. **Search for client** (add new if need be)
4. **Manage/ Create Household** *Located under households tab
5. Add **ROI**/ Lock profile if requested by client * for locking a profile please see System Admin with guidance on this *Upload ROI to client profile
6. **Add Entry** *Located under entry exit tab
    - **Entry Type**= HUD
    - **Entry Date** = The date you completed the intake (CoC Intake)
    - **Add ROI Outreach Sharing Plan Sub-Assessment for HOH**
    - **Complete** the **MSHMIS Coordinated Entry <u>if</u> Community Partner <u>if</u> TrueNorth complete CoC Intake** questions for all household members.
    - **Complete Current Living Situation** question for **HOH**




- **Complete VI/VI-F SPDAT** on Entry page for **HOH**
- **Add Coordinated Entry Assessment** (4.19 sub assessment) for **<u>HOH</u>**

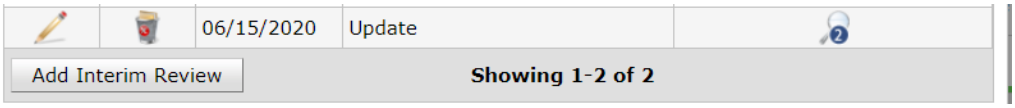


7. **Refer Client to an open resource**
    - Add **Coordinated Entry Event** (4.20 Sub Assessment) to **<u>HOH</u>**
        i. Referral to RRH project or
        ii. Referral to PSH Project OR
        iii. Referral to other PH/unit/ resource opening

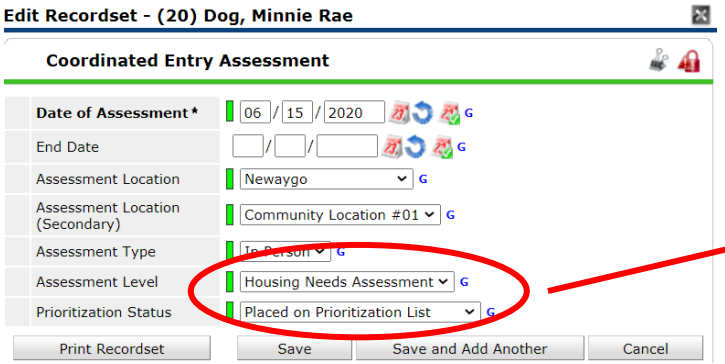



- *If client is referred to SSVF or Youth program please see referral transaction work flow and make a referral service transaction in HMIS on the Service Transitions Tab*
- Add note on client profile page for in regards to your CE Intake
- Add Case Care Management service transaction to indicate you completed CE Intake

8. **Client added to prioritization** *** This is where case is passed on to a case manager***
    - They day that it has been decided what program/ prioritization client is going to be added to. **Add an Interim review** to the Entry/Exit under the current CE program entry.

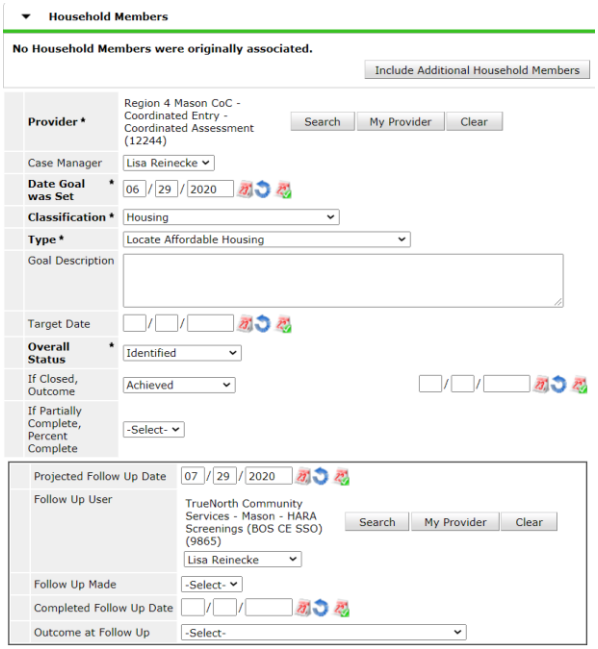



- Complete the following for all Household members **Be sure to answer the HUD Verification
    i. Heath Insurance
    ii. Disabilities
    iii. Monthly Income
    iv. Non-Cash Benefits
- Complete a new Coordinated Entry Assessment (4.19 Sub Assessment) **You will be making a Housing Needs Assessment and indicating that the individual/family was placed on the prioritization list

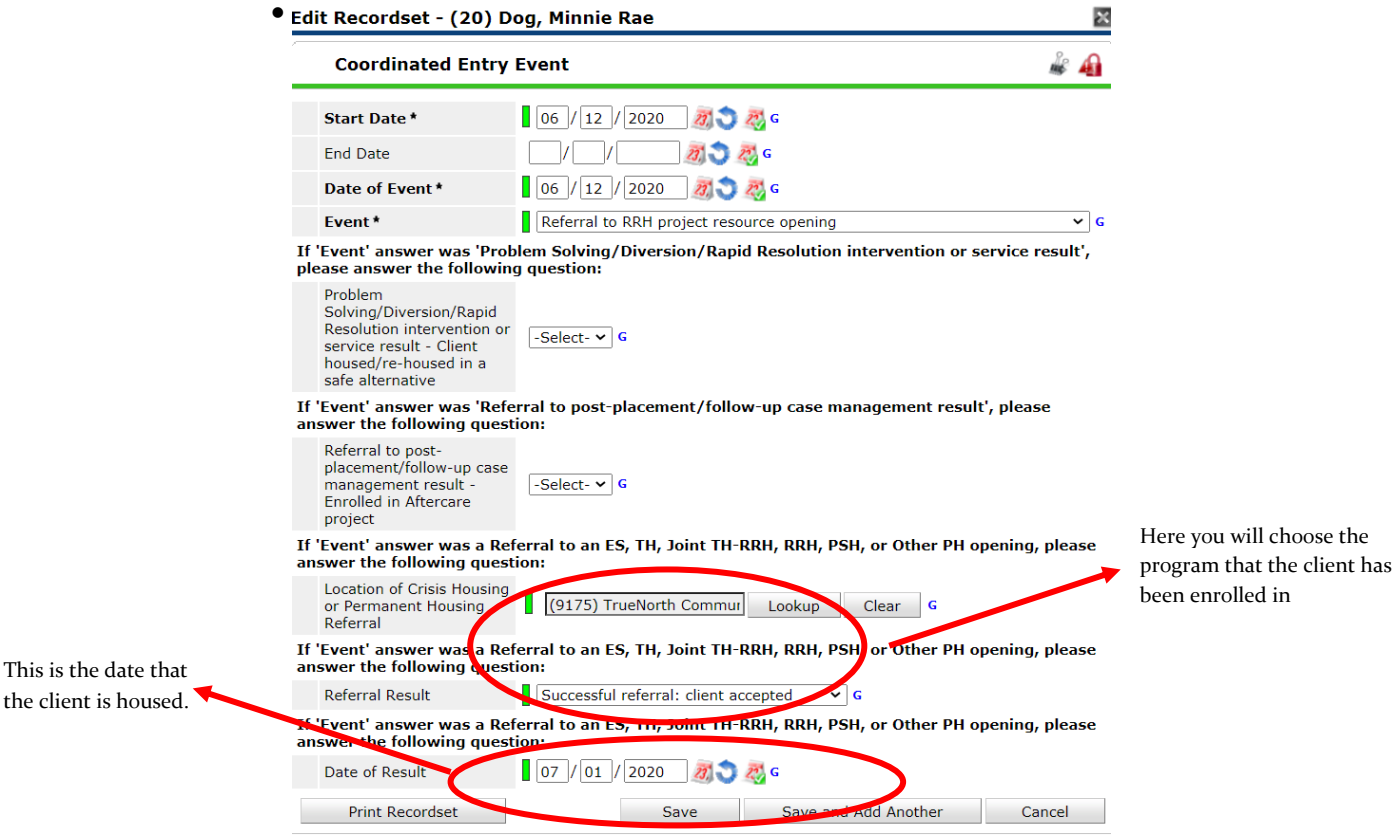



Notice the change: It is no longer crisis assessment but Housing Needs Assessment & client was placed on prioritization list

- Add yourself as **Case Manager** under the case manager tab, while EDA in to CE page.
- Add a **Housing Goal** under the Case Plans Tab attach goal to only HOH
    i. This is also where you will add **follow ups under the housing plan, 30, 60, and 90 days**.




9. **Client enters into ESG RRH, MSHDA RRH, PSH, or other housing program**
    - The day client enters into a housing program **add an Interim review** to the Entry/Exit under the current CE program entry.
    - Update any household changes for all members in the interim
    - **Edit the Coordinated Entry Event** (4.20 Sub Assessment) **You will edit the original event from when you did the Entry

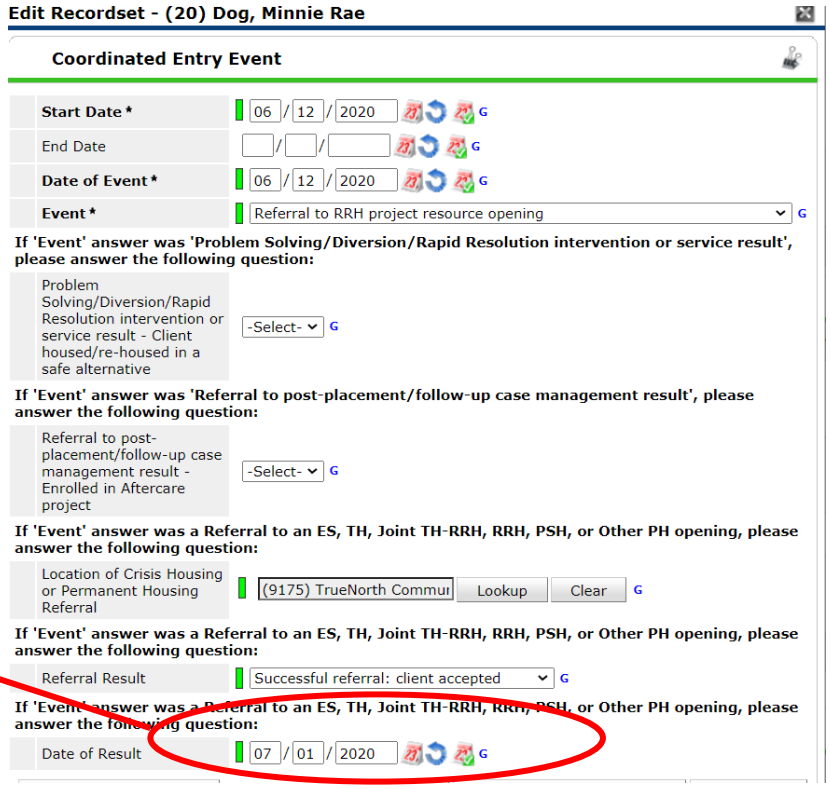



- It is very possible you will have two entries that are running simultaneously. One for coordinated entry and one for the housing program
- ***If client is housed the same time as they enter into housing program you will add a housing move in date to this interim for HOH only and you will exit them from CE one hour after the interim.***

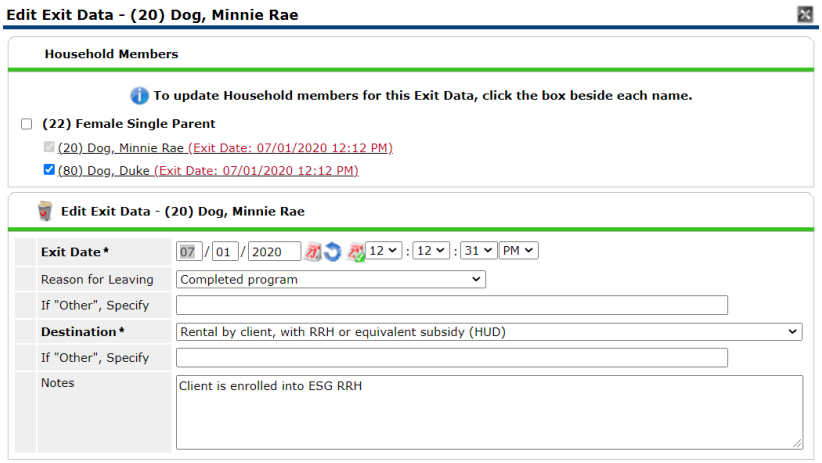
## 10. Client Exits from Coordinated Entry

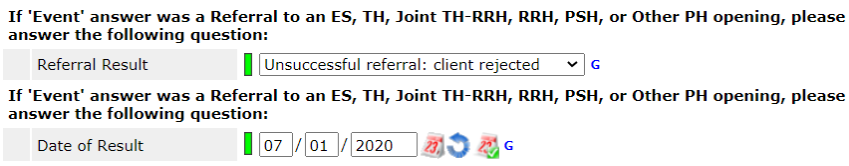
- Once client is housed you will need to exit them from CE but first….
- You will need to add an interim one hour before exit and add a move in date. You will include everyone in the Household in the interim but you will only add a housing move in date for the HOH.
- One hour after the interim you will add the exit. **Please note you do not have to wait an actual hour, you can just change the time stamp to show an hour difference.
- You will edit the Coordinated Entry Event and indicate the date that the referral to project. – The date the client is housed

This is the date that the client is housed.




- **Client exit will look like the following if client is housed in a housing program:**




- If you **do not hear** from a client for **90 days you will exit them**.
    i. You will add an interim one hour before exit and you will indicate on the Coordinated Entry Event that the referral result = **unsuccessful referral: client rejected & Date of Result = date of exit**