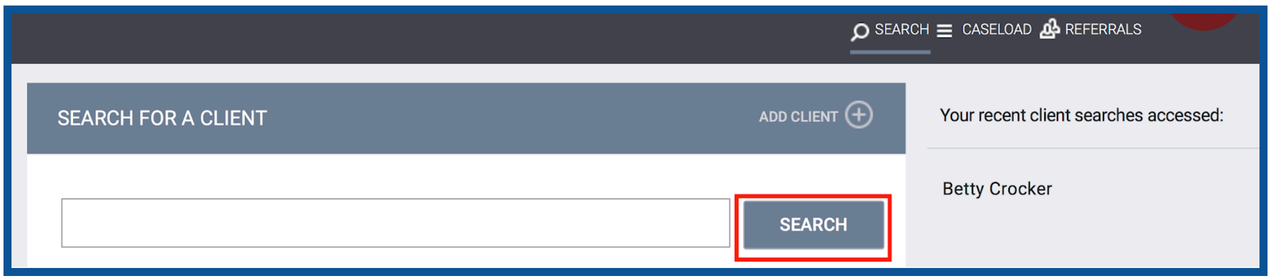
Coordinated Entry Assessor Workflow

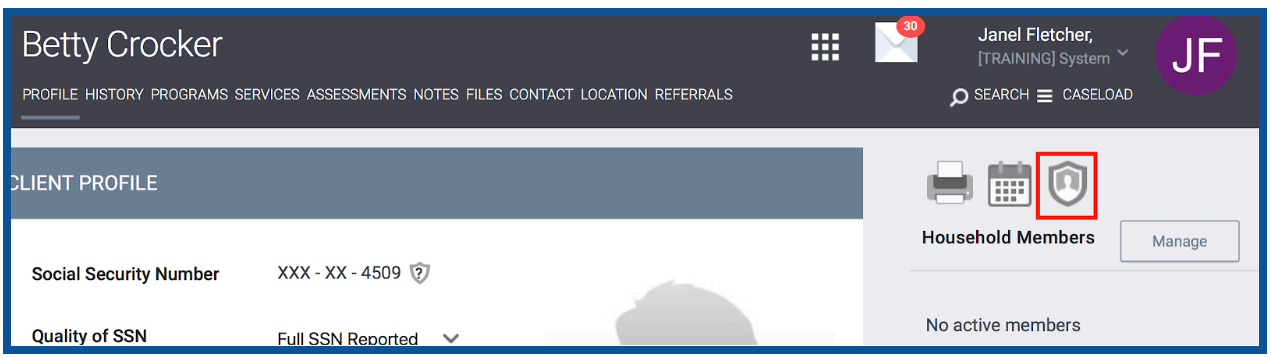
The purpose of this workflow document is to show the Coordinated Entry Assessor Workflow starting August 15, 2022. Assessment Only agencies are now required to complete a minimal Coordinated Entry program enrollment and to record the Current Living Situation assessment for folks who complete a Coordinated Assessment (VI-SPDAT or VI-F-SPDAT) at their agency. This workflow will begin with a refresher on how to review the ROI prior to entering data in HMIS.

I. First, search for the person and Review the Release Of Information (ROI).

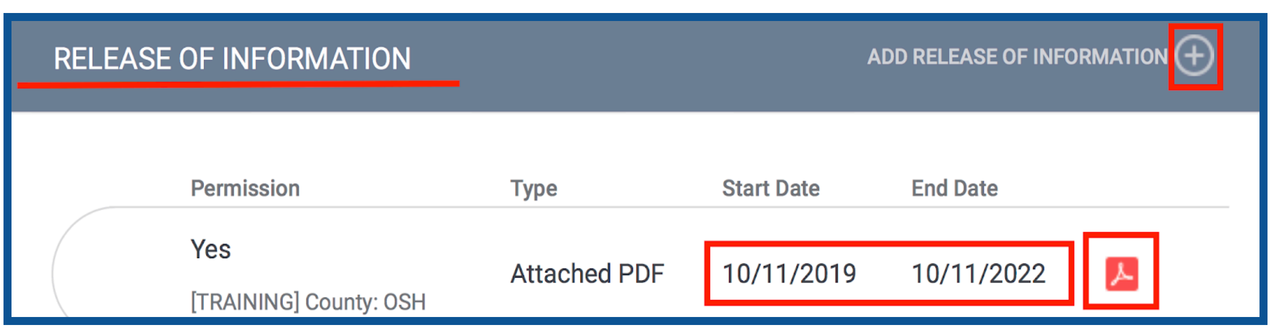
1) Always search for the person prior to creating a new client record. This will prevent duplicates in the system. Individuals can be searched by typing partial first name, last name, social security number (xxx-xx-xxxx or last 4 digits), or date of birth (mm/dd/yyyy).



2) If the person appears, click the shield icon to review the attached PDF ROI.

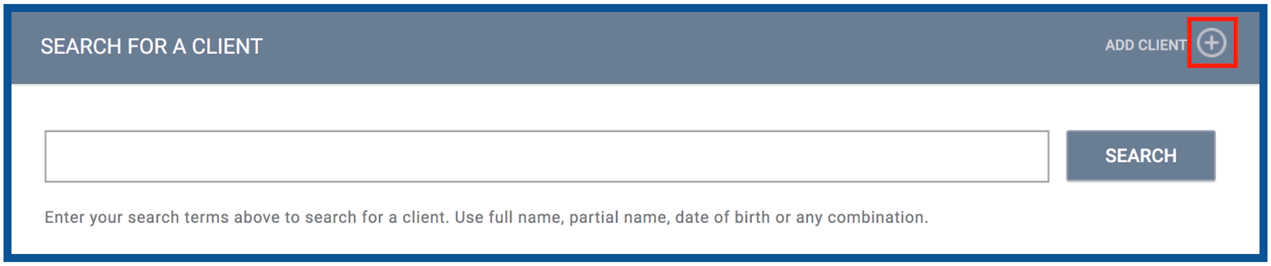


3) In the Release of Information section of the screen, open the PDF and review the boxes initialed by the individual. The boxes initialed by this person identifies what information they consent to have entered in HMIS. If a box is not initialed by the person, they do not consent to having that information entered. Double check expiration date on the PDF ROI matches the expiration date in Clarity.

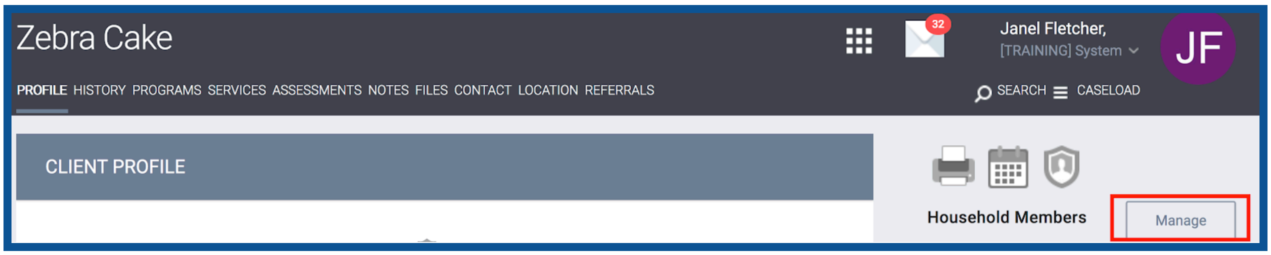


II. Configure the Household.

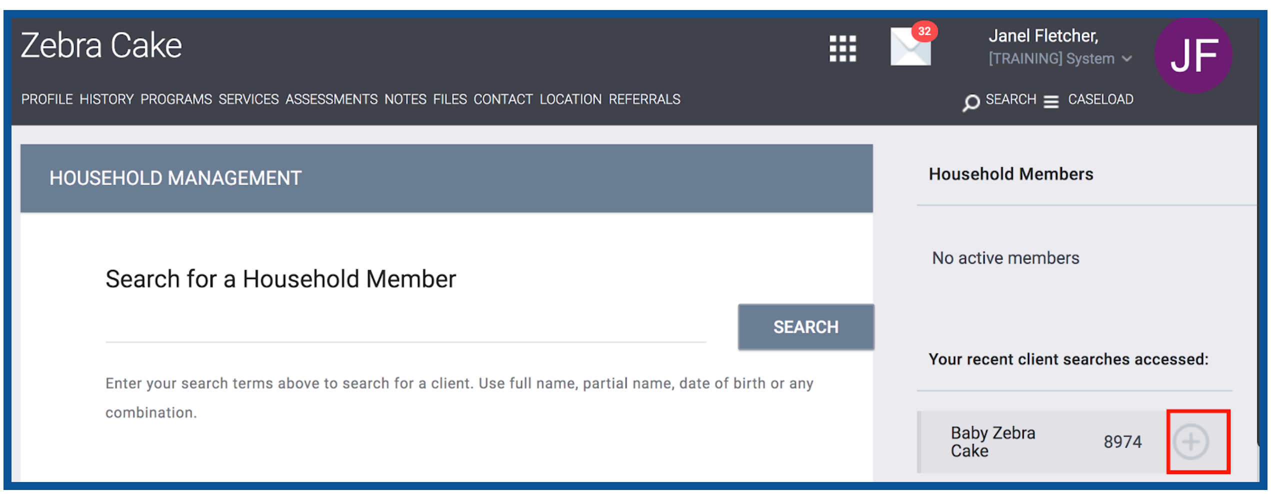
4) Complete these steps for every member of the household so that each person has a profile created and an ROI uploaded. Select ADD CLIENT to add individuals that did not appear during your search.



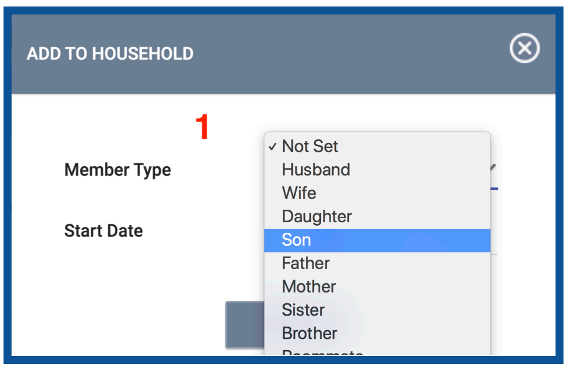
5) From the Head of Household's profile, select MANAGE on the right side of the screen.

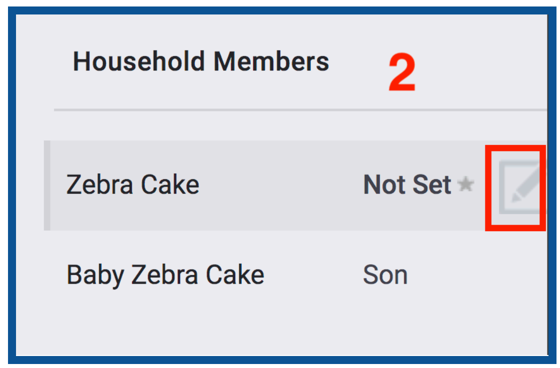


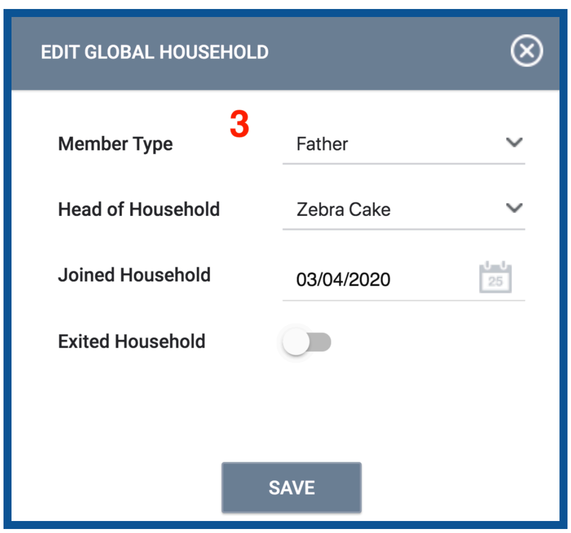
6) Next, choose a family member under the Your recent client searches accessed section to add to the household. A plus sign will appear when you move your mouse to the right of the family member's name.



7) Select the Member type of the person you just selected (ex: Child), and click Save (screenshot 1). Next, update the member type for the Head of Household (HoH) by moving your mouse to the right so the edit symbol will appear (screenshot 2). Note, the HoH has a star next to their member type. If you have the wrong person as HoH, you can also update the HoH here (screenshot 3), and save. Once the family is configured each member will appear with the member type and as in screenshot 4.

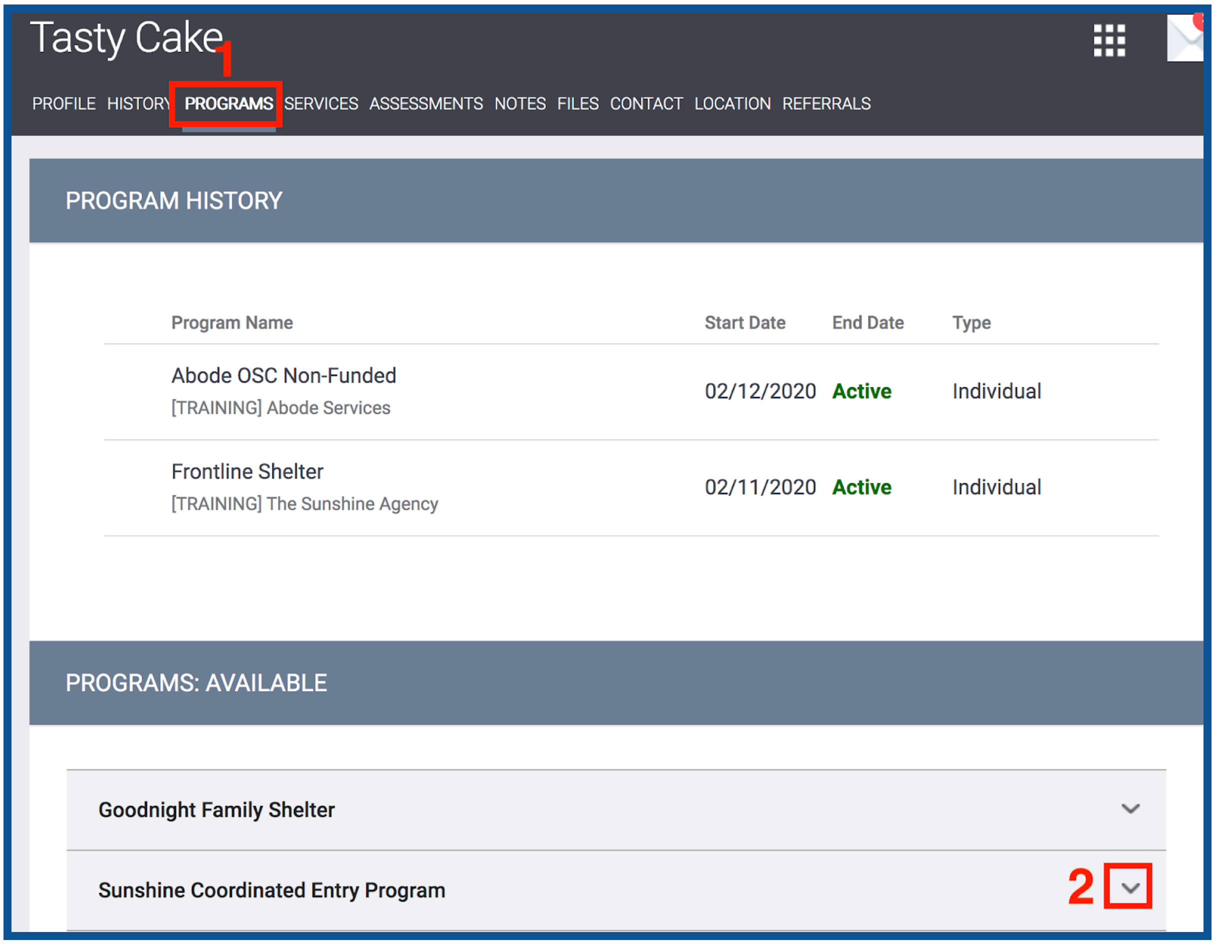


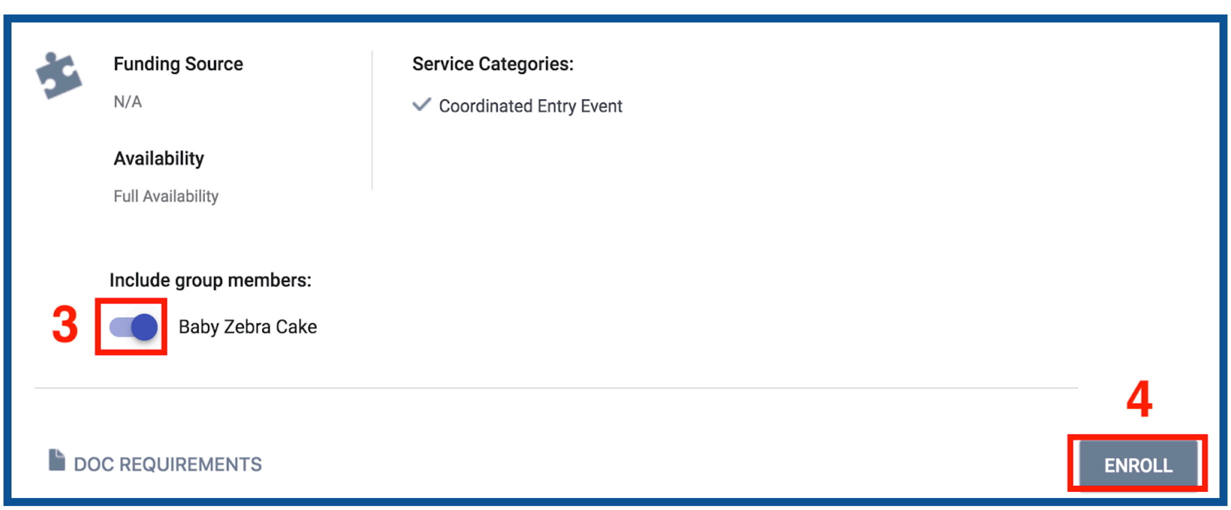




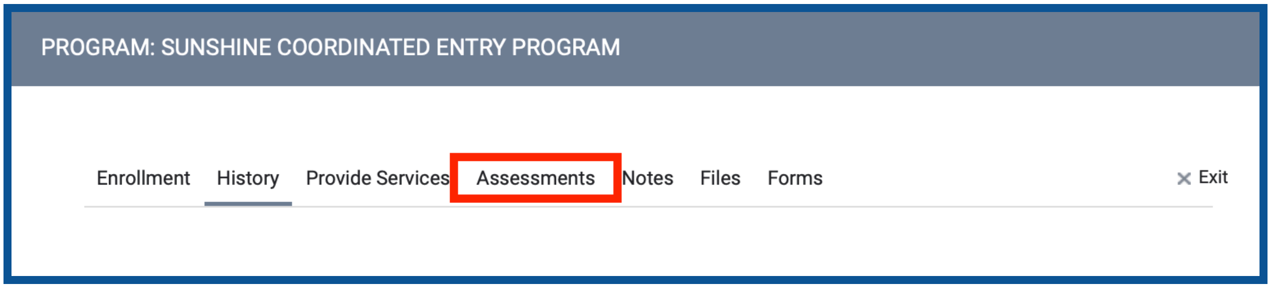
III. Next, enroll into the Coordinated Entry Program.

8) As in the numbered screenshots below, (1) click on the Programs tab, next, (2) click on the agency coordinated entry program [AGENCY NAME] Coordinated Entry, and (3) toggle on minor children in the household and click enroll (4). Note households of more than one adult should not toggle on the group member. **Separate enrollments should be completed for families with only adults in the household.** Complete the questions that appear on the enrollment screen and save (not pictured).





After enrolling the client in the program, you will arrive on the program enrollment menu. This menu will allow you to record the Coordinated Entry Assessment (VI-SPDAT and VI-F-SPDAT) and the Current Living Situation assessment. Select the Assessments tab to view these assessments.



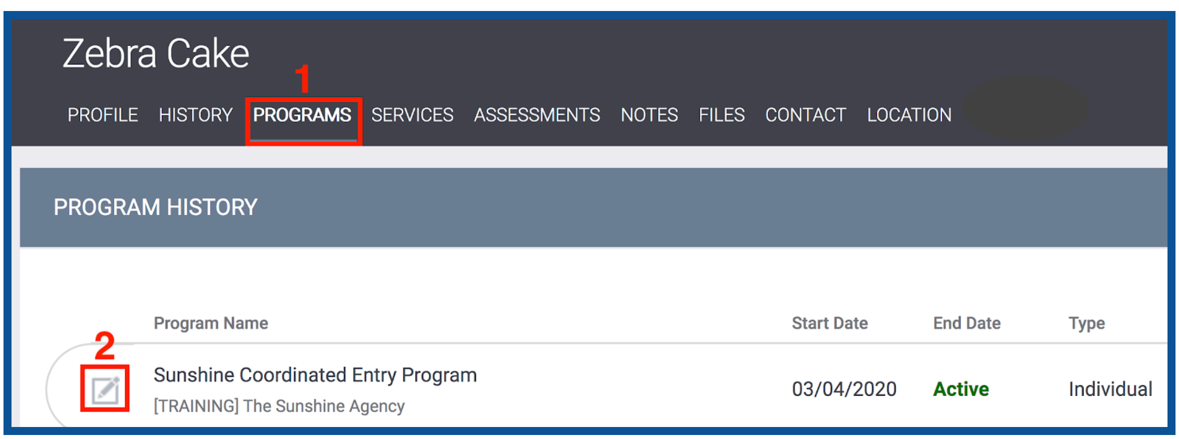
III. Record the Current Living Situation and Coordinated Entry Assessments

Living situations are used to understand how many times a person is engaged while experiencing homelessness and can also be used to document homeless chronicity and risk of imminent homelessness.

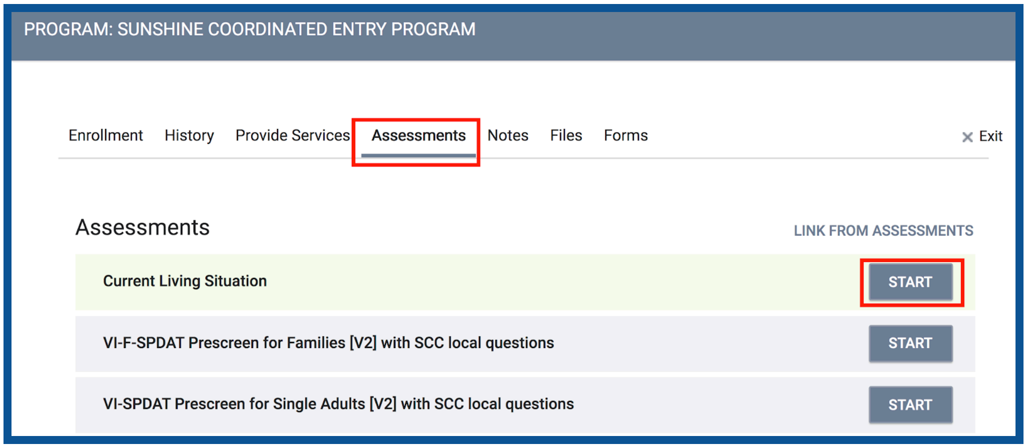
When to record the Current Living Situation Assessment:

Coordinated Entry assessors are expected to record every direct contact made with each client in the HMIS via data element 4.12, Current Living Situation. ([HUD 2020 HMIS Data Standards Manual - Version 1.6](#)).” In HMIS, this is the Current Living Situation Assessment.

9) At enrollment and every time a person returns to your agency, open the program enrollment to record the Current Living Situation Assessment.

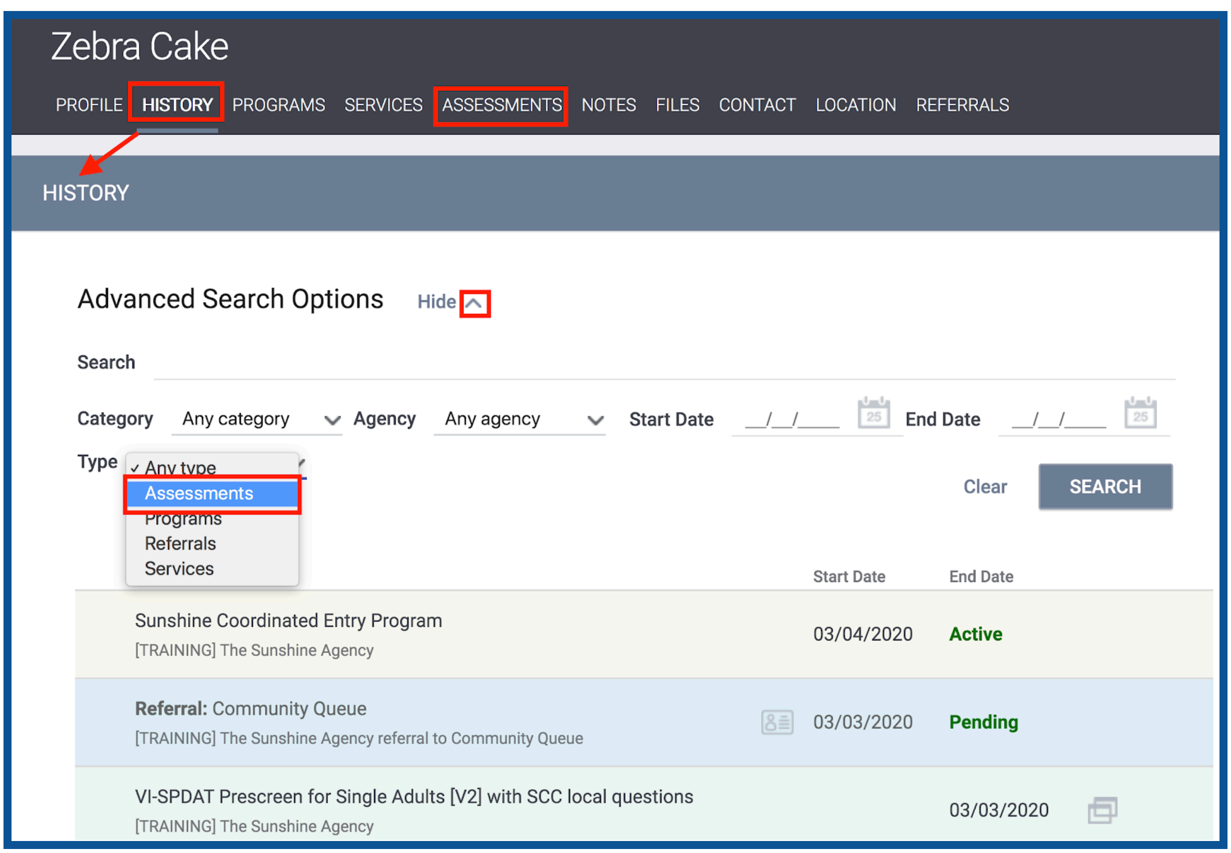


10) Next, click on the Assessments Tab and click START on the Current Living Situation assessment. Complete the Assessment questions and save.

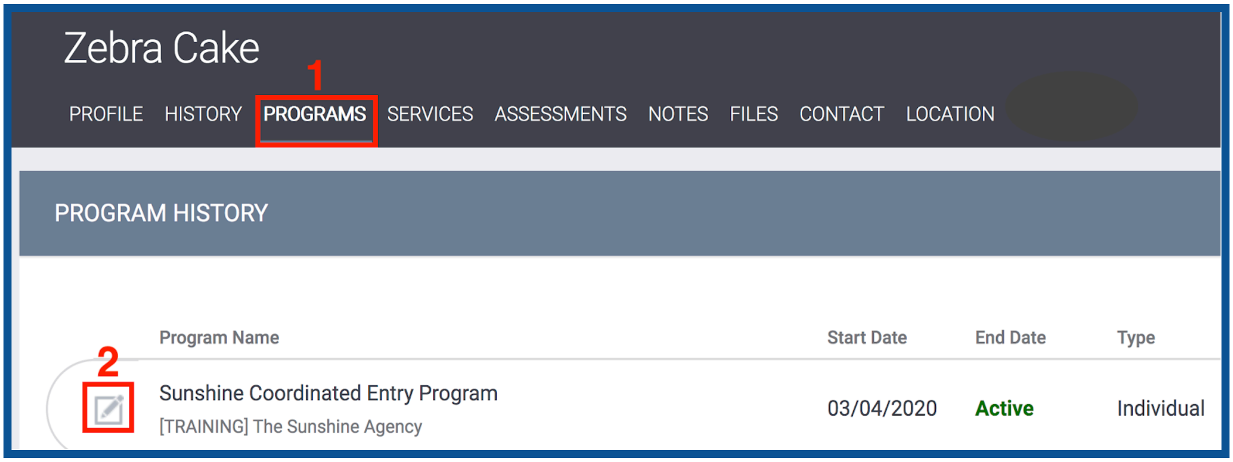


When to record the Coordinated Entry Assessment:
Complete the VI-SPDAT if it has been more than one year since the last VI-SPDAT was completed, or if the client has experienced a significant change/life event since the last VI-SPDAT (e.g. change in health, income, and/or family structure). **Please do not record a new assessment before 365 days unless someone experiences a significant change since their last assessment.**

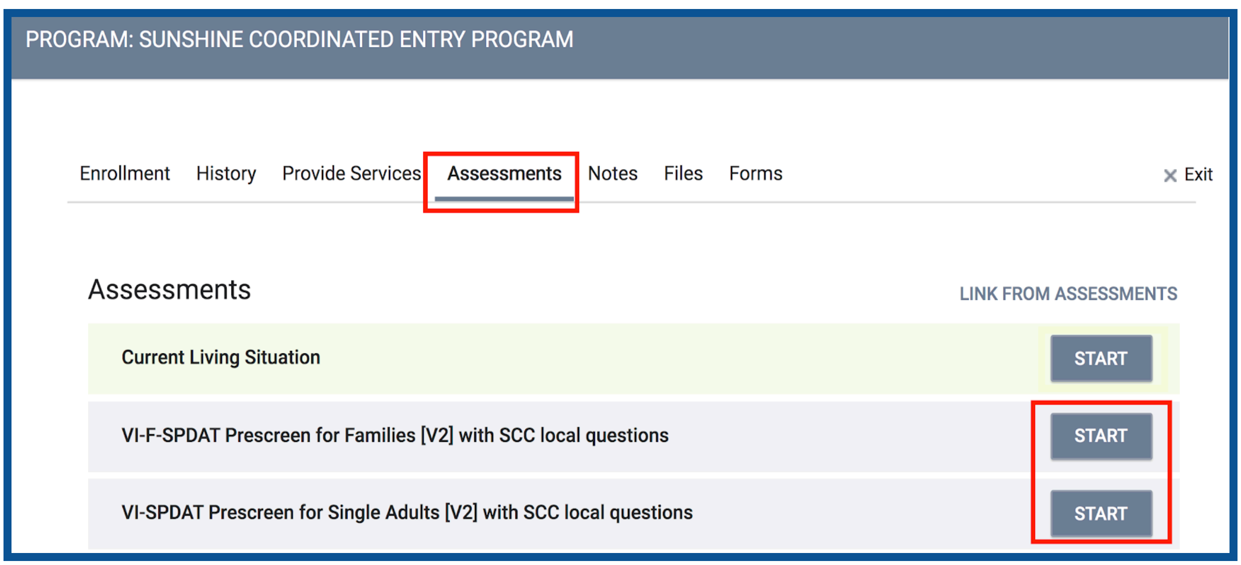
11) Check to see if a person has an assessment recorded by clicking the client level History or Assessment tab. History tab pictured below.



12) If the person does not have an assessment completed in the time frame, record a new assessment in the program. From the profile screen, click on programs (1) and open the program enrollment (2).



13) Next, click on the Assessments Tab, complete the Coordinated Entry Assessment (VI-SPDAT/ VI-F-SPDAT/VI-Y-SPDAT) and save.



14) After completing the VI-SPDAT, review the client's score. Only clients who score **4 or higher** on the VI-SPDAT, regardless of veteran status, should be referred to the queue - toggle on the **Community Housing Queue ONLY** to refer them to the correct queue. **Assessors should NEVER refer clients to the queue called Administration Only/CET.**