Wisconsin Balance of State CoC Coordinated Entry and Referral Process for Prevention

Institute for Community Alliances

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INTRODUCTION

The Wisconsin Balance of State Continuum of Care (WI BoS CoC) has implemented a streamlined process for referring and enrolling individuals and households into Prevention programs. This process is now part of the CoC coordinated entry system. The WI BoS CoC will maintain community-wide Prevention priority lists for each LCAS. Individuals and households in need of housing, will be placed on this priority list and ranked in order of greatest need. All Prevention programs that are funded through the State of Wisconsin ETH Grant are required to enroll clients using the priority list, and other community programs are encouraged to use the priority list as well. Additional information about the WI BoS CoC Coordinated Entry process can be found here, http://www.wiboscoc.org/coordinated-entry.html.

1. REQUIREMENTS FOR ADDING CLIENTS TO THE PRIORITY LISTS

Anyone with a ServicePoint user license can add an individual or household to the priority list. It is not necessary for the individual or household to be enrolled in a program at your agency in order for you to add the person to the priority list. In order to make a referral to a priority list, you will need to have completed the Coordinated Entry Prevention Assessment in ServicePoint.

2. HOW TO ADD AN INDIVIDUAL OR HOUSEHOLD TO THE PRIORITY LISTS

A. ADD THE CLIENT TO SERVICEPOINT

- If the client or household you're referring is not enrolled in any program at your agency, it will be easiest to enter the client into ServicePoint and make the referral from your main agency provider (not a program-specific provider). This is not a requirement if you do not have access to your main agency (Level 2) provider, or if you would rather enter the referral under a program provider.
- Use the Client Search to look for an existing client file or add a new client to ServicePoint. If you're referring a household, use the Client Search to look for the head of household, and enter this household member first.
 - The minimum data needed in order to add someone to ServicePoint is a name, the client's gender and date of birth. In order to make a good referral, you will need some additional information including the questions contained in the Coordinated Entry Prevention Assessment.

B. COMPLETE THE CLIENT RECORD AND THE COORDINATED ENTRY ASSESSMENT – WI BOS COC The client record is found at the top of the Client Profile tab.

lient Information	Service Transactions	
ummary Client Profile Households ROI Entry / Exit		Case Managers Case Plans
💋 Client Record	Issue ID (
Name	Test, Test	
Name Data Quality	Full Name Reported	
Alias		
Social Security	222-22-1114	
SSN Data Quality		
U.S. Military Veteran?	Yes (HUD)	
Age	43	

The Coordinated Entry Prevention Assessment – WI BoS CoC can be found under the Assessments Tab. You will need to go to the Assessments tab and choose the CE Prevention Assessment. Fill in as much of the information as you have for

the client. All questions on the CE Prevention Assessment must be answered. The questions contained on this page make up the prioritization tool that is being used for Prevention programs. Once these questions are answered, the Coordinated Entry Prioritization for BOS Prevention report will calculate the score. There will not be any score that will need to be attached when doing a referral, but the score will only be calculated accurately if all questions are answered.

COORDINATED ENTRY PREVENTION ASSESSMENT ON THE ASSESSMENTS TAB

• Go to the Assessments Tab. Choose the Coordinated Entry Assessment. Click Submit.

Client Information						Service Transaction	5			
Summary	Client Profile	Households	ROI		Entry / Exit	Case Managers	Case Plans	Measurements	Activities	Assessments
				Select a	an Assessment					
				Coordinated I	Entry Prevention Assess	ment – WI BoS CoC ${\scriptstyle arsigma}$	Submit			
										• •

When completing the assessment, make sure that the questions used to determine the prioritization score have been completed accurately. The questions are shown below:

P	lease answer for Head of Household	
	Annual household gross income amount	More than 30% of AMI for household size (0 points) $~~~\vee~~{\rm G}$
	What is the last grade of school you completed?	Post Graduate V G
	At least one dependent child under age 6	No (0 Points) V G
	Single parent with minor child(ren)	No (0 Points) V G
	Household size of 5 or more?	No V G
	Pregnant?	No (HUD) V G
	Does the client have a disabling condition?	Client refused (HUD) V
	Number of times literally homeless in the past 3 years?	Never V G
	Total number of months of literal homelessness in the past 3 years?	Less than a month \checkmark G
	Number of times you have had to move because of economic factors in the last 2 years?	0 ~ G
	Court ordered rental evictions on your record within the past 3 years?	No prior rental evictions (0 points) ${}^{\checkmark}$ G
	Domestic violence victim/survivor	No (HUD) V G
	If yes for Domestic Violence Victim/Survivor, are you currently fleeing?	No (HUD) V G
	Criminal record for arson, drug dealing or manufacture, or felony offense against persons or property	No (0 Points) V G
	Registered sex offender	No (0 Points) V G
	Means of Transportation	Bus ~ G

3. REFERRAL PROCESS

A. ANSWER ALL THE QUESTIONS ON THE COORDINATED ENTRY PREVENTION ASSESSMENT

Interviewer's Information	
Interviewer's Name	G
Agency's Full Name	G
Job Title at Agency	-Select- V G
Today's Date (date of interview)	// 🧖 💐 🧟 G
Client ROI Signed	
Has the client consented to participate?	Yes v G
Please answer for Head of Household	
Annual household gross income amount	More than 30% of AMI for household size (0 points)
What is the last grade of school you completed?	Post Graduate \vee G
At least one dependent child under age 6	No (0 Points) \checkmark G
Single parent with minor child(ren)	No (0 Points) \vee G
Household size of 5 or more?	No ~ G
Pregnant?	No (HUD) V G
Does the client have a disabling condition?	Client refused (HUD) V
Number of times literally homeless in the past 3 years?	Never \vee G
Total number of months of literal homelessness in the past 3 year	s? Less than a month \vee G
Number of times you have had to move because of economic factors in the last 2 years?	0 ~ G
Court ordered rental evictions on your record within the past 3 years?	No prior rental evictions (0 points) \checkmark G
Domestic violence victim/survivor	No (HUD) V G
If yes for Domestic Violence Victim/Survivor, are you currently fleeing?	No (HUD) V G
Criminal record for arson, drug dealing or manufacture, or felony offense against persons or property	No (0 Points) \lor G
Registered sex offender	No (0 Points) \vee G

Client Contact Information

Means of Transportation

On a regular day, where is it easiest to find you and what time of day is easiest to do so?	CVI Vets Place Central] G
Is there a phone number and/or email where someone can get in touch with you or leave you a message?	123-456-7891, test.test@gmail.com] G

Bus

~ **G**

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B. ADD A REFERRAL TO THE PREVENTION PRIORITY LIST

Once you've completed the Coordinated Entry Prevention Assessment, you are ready to make a referral to the Prevention priority list. If you are referring a Family, you should only include the Head of Household in the referral. To add a referral, go into the Service Transactions tab of HMIS:

Service Transac	ctions	
tiple Services	Add Referrals	View Previous Service Transactions

To create a referral, you need to identify a service transaction type, a provider of that service and the date on which the referral was made.

• Your service transaction type will be Rent Payment Assistance (BH-3800.7000). Select the service transaction type, and then click Add Terms. It will look like nothing has happened, but if you scroll to the bottom of the screen, you will see the service transaction type listed.

	Select up to 5 Needs	
Service Code Quicklist		
Case/Care Management (P Family Permanent Support Homeless Motel Vouchers (Homeless Permanent Supp Job Training Formats (ND-	-1000) ve Housing (BH-8400.2000) BH-1800.8500-300) ortive Housing (BH-8400.3000) 000.3500)	
Rent Payment Assistance (H-3800.7000)	

Next, select the provider. To make a referral to the priority list for singles, you need to choose your local CoC Prevention Priority List. For example, BoS Coulee Prevention Priority List. Select the correct list and click Add Provider.

Referral Provide	er Quicklist				
Provider	BOS Coulee Prevention Priority List (10204)	~	Add Provider	Bed Availability	

Finally, you will need to enter the date of the referral. You *do not* need to complete the referral ranking or attach a score when making a referral for Prevention.

Refer to Providers	
Referral Data	
Needs Referral Date*	06 / 26 / 2017 🔊 🖓 3 🗸 : 21 🗸 : 12 🗸 PM 🗸
Referral Ranking	-Select- 🗸
VI-SPDAT Score	Please Select a VI-SPDAT Score Search Clear
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score Search Clear
VI-FSPDAT Score	Please Select a VI-FSPDAT Score Search Clear
Projected Follow Up Date	07 / 26 / 2017 🥂 🤯
Follow Up User	Institute for Community Alliances - Wisconsin (2) Search My Provider Clear

Make sure to check the box by the service transaction type in the Referrals section.

Referrals		Send Summary
Referred-To Provider	Rent Payment Assistance	Referred Clients
BOS Coulee Prevention Priority List (10204)		(72036) Test, Test

Set a Projected Follow Up Date and enter your user information for the Follow Up User.

Refer to Providers	
Referral Data	
Needs Referral Date *	06 / 26 / 2017 🛛 🧖 💙 🤯 3 🗸 : 21 🗸 : 12 🗸 PM 🗸
Referral Ranking	-Select- 🗸
VI-SPDAT Score	Please Select a VI-SPDAT Score Search Clear
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score Search Clear
VI-FSPDAT Score	Please Select a VI-FSPDAT Score Search Clear
Projected Follow Up Date	07 / 26 / 2017 🥂
Follow Up User	Institute for Community Alliances - Wisconsin (2) Search My Provider Clear Leigh Polodna ~

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Set the Need Status/Outcome to "Identified." Once you have selected the appropriate items, your referral will look like the example below. Click Save ALL.

Referral Data									
Needs Referral Date *	06 / 26 / 2017	<u>Ø</u>	м ~						
Referral Ranking	-Select- V								
VI-SPDAT Score	Please Select a VI-SF	PDAT Score Search Clear							
TAY-VI-SPDAT Score	Please Select a TAY-	VI-SPDAT Score Search C	ear						
VI-FSPDAT Score	Please Select a VI-FS	SPDAT Score Search Clear							
Projected Follow Up Date	07 / 26 / 2017	20 🔿 20							
Follow Up User	Follow Up User Institute for Community Alliances - Wisconsin (2) Leigh Polodna V								
	Check to notify Se	ervicePoint Providers by Email.							
Referrals								Send	Summary
Referred-To Provider				Rent Payment Assistan	ce		Referred	Clients	
BOS Coulee Prevention Priority	List (10204)			M			(72036) 1	est, lest	
 Need Data 									
Date of Need * 06	/ 26 / 2017 🥂 🕽	3 ∨:21 ∨:12 ∨ PM ∨							
Selected Needs									
Need				Amount if Financial	Need Status / Outo	come / If Not Met, Reas	on		Notes
Rent Payment Assistance (BH-3800.7000)				Identified v -Select- v -Select-		~			
Remove All Needs									
						Cave Needs ONLY	Save All	Close ALL	Cancel

5. UPDATING A REFERRAL WHEN ASSESSMENT ANSWERS HAVE CHANGED

If the client's assessment score has changed, their existing priority list referral should be updated. To update this, you need to update the questions on the Coordinated Entry Prevention Assessment and that will change the score in the Prevention Prioritization Report.

A. UPDATING A REFERRAL

Please answer for Head of Household

Annual household gross income amount	More than 30% of AMI for household size (0 points) \sim G
What is the last grade of school you completed?	Post Graduate \checkmark G
At least one dependent child under age 6	No (0 Points) V G
Single parent with minor child(ren)	No (0 Points) V G
Household size of 5 or more?	No V G
Pregnant?	No (HUD) V G
Does the client have a disabling condition?	Client refused (HUD) V
Number of times literally homeless in the past 3 years?	Never V G
Total number of months of literal homelessness in the past 3 years?	Less than a month \checkmark G
Number of times you have had to move because of economic factors in the last 2 years?	0 ~ G
Court ordered rental evictions on your record within the past 3 years?	No prior rental evictions (0 points) \vee G
Domestic violence victim/survivor	No (HUD) V G
If yes for Domestic Violence Victim/Survivor, are you currently fleeing?	No (HUD) V G
Criminal record for arson, drug dealing or manufacture, or felony offense against persons or property	No (0 Points) V G
Registered sex offender	No (0 Points) V G
Means of Transportation	Bus v G

After entering the new answers in the assessment, click Save to update the coordinated entry assessment. You do not have to go back into the referral when updating the above questions that effect a client's score.

6. VIEWING THE PRIORITY LISTS

Agencies in the CoC that provide ETH Prevention services, will need to use the Advanced Reporting Tool (ART) to view the priority lists.

Advanced Reporting Tool

Click the black arrow to display the Public Folder

	ART Br	owser
•		Inbox
•		Favorites
•	4	Available Reports and Templates
•	1	Bowman Systems Resources
-		Public Folder
		1 Dana CaC

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• Navigate to the Coordinated Entry folder, and open the folder for the Balance of State CoC. This folder contains two reports – one for the family report, and another for the singles priority list. Use the most recent version available.

•	lla Coordinated	Entry Reports
	🔻 惧 Balan	ice of State CoC
	🕨 🕨 📗	Archive
	🕨 🕨 📗	Evaluation
	Q	Coordinated Entry Follow-up Audit
	\rightarrow Q	Coordinated Entry Prioritization for BOS Prevention
	Q	Entries During Period for CE Audit
	Q	Households with Children - Coordinated Entry Prioritization
	Q	Households without Children - Coordinated Entry Prioritization

• Click on the magnifying glass. Then select View Report. All users with an ART license can run this report in "View" mode.

	Coordinat	ted Entry Prioritization		
/	Name	Coordinated Entry Prioritization for BOS Prevention		
/	Description	Since 111516 dane rrh list limit score, remove housign status from dane tabs		
	Creation Date	2017-08-23 12:11		
	Update Date	2017-08-23 12:11		
	Туре	Webi		
	Owner	wisconsin_live:lpolodna		

• Complete the required report prompts. Set the effective date to the current date. Choose the correct prioritization list provider. Once both prompts are complete, click Run Query.

	Prompts X
	Reply to prompts before running the query.
	EDA Provider -Default Provider-
1	Choose Prioritization List: BOS Coulee Prevention Priority List(10204);BOS Wes
1	EDA Provider -Default Provider-
	Enter effective date 7/13/2017 12:00:00 AM
	Refresh Values 🕉 EDA Provider
	To see the content of the list, please click the Refresh values button.
	<
	Enter your search pattern here
	More Information
	Select or type the values you want to return to reports for each prompt displayed here.
	Run Query Cancel

A. PREVENTION PRIORITY REPORT

Summary	Prevention Prioritization List	Accepted Referrals	Accepted (Individuals)	Canceled, Declined, Other			
Summary – confidentiality statement and summary statistics							
Accepted Refe	rrals						

Accepted (Individuals)

Canceled, Declined, Other

There is not a Family or Single list, because that is not a need to differentiate between household type. There is just one report for all households referred to the list.

7. HOW TO ACCEPT AN INDIVIDUAL OR HOUSEHOLD OFF THE PRIORITY LIST FOR PROGRAM ENROLLMENT

FOR CLIENTS ENROLLING IN A PROGRAM AT YOUR AGENCY

If you are accepting a referral because you're enrolling a client in a program at your agency, then you will need to add a Service Transaction for *your agency's program*. Make sure to use the correct prevention program provider in HMIS.

Only "accept" the referral for clients *entering a program at your agency*. See the "Canceled/Declined" Section for more information about removing clients no longer in need of prevention services from the priority list, including clients who secured housing on their own or clients who obtained housing from a provider that does not use HMIS.

• Go to the client file for the client you are going to accept off the priority list, and click on the Service Transactions tab.

Client - (72036) Test, Test	<u>n</u>
🧃 (72036) Test, Test	
Release of Information: Expired	-Switch to Another Household Member-
Client Information	Service Transactions
Summary Client Profile Households ROI Entry / Exi	it Case Managers Case Plans Measurements Assessments

• Click on "View Entire Service History"

Service Transaction	Dashboard			
	1		•	
Add Need	Add Service	Add Multiple Services	Add Referrals	View Previous Service Transactions
View Shelter Stays	View Entire Service History			

• Click on the Referrals tab

Client Information			Service Tra	insactions	
Needs	Services	Referrals		Shelter Stays	Entire Service History

• Click on the pencil for the referral that you want to accept.

	Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcom
/ 🖠	06/26/2017	06/26/2017	BOS Coulee Prevention Priority List		Rent Payment Assistance	Identified	
1	ac inc inna -	0010010000	we have a strategy as the set of	8 F 1	e at h		

Change the referral outcome to "Accepted"

Referred-To Provider	BOS Coulee Prevention Priority List (10204)
Needs Referral Date*	06 / 26 / 2017 🥂 🎘 3 🗸 : 21 🗸 : 12 🗸 PM 🗸
Referral Ranking	-Select- V
VI-SPDAT Score	Please Select a VI-SPDAT Score Search Clear
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score Search Clear
VI-FSPDAT Score	Please Select a VI-FSPDAT Score Search Clear
Referral Outcome	Accepted
Follow Up Information	

Select Need Status as "Closed" and "Fully Met"

Need State	ıs / Outcome / If Not Met, Reason
Closed	×
Fully Met	•
-Select-	•

• For all accepted referrals, click on Provide Service. *Important* - Make sure the Service Transaction is created for the specific program in which the client is enrolling.

Service Information
Provide Service () A Service has not yet been provided for this Referral.

8. RETURNING A CLIENT TO THE PRIORITY LIST

Individuals or households accepted off the Priority List that DO NOT Enroll in your program (were not provided prevention services) must be returned to the priority list.

- Return to the "Entire Service History" page for the client and find the referral to the priority list, and subsequent service transaction for housing
- Click on the garbage can on the Service line to delete the service transaction (If you cannot delete, contact your ICA System Administrator)

A	ll Ser	vice	Transactions					
Select	Date:	s ~		Start Date	a d z	End Date	A D R.	Sea
			Transaction Type	Date	Provider		Туре	Need Status / Outcome
/ 🛰	2	5	Need	06/26/2017	Institute for Community Alliances - Wisconsin		Rent Payment Assistance	Closed / Fully Met
/		1	Referral	06/26/2017	BOS Coulee Prevention Priority List		Rent Payment Assistance	
		1	Service	06/26/2017	Institute for Community Alliances - Wisconsin		Rent Payment Assistance	
19 000		2						

When the Service is deleted, the original Referral will also be deleted. You will have to re-enter the referral from
the original need date. *NOTE* – do not re-enter the referral until the original is deleted, and do not create both a
new need and a new referral. This part can be confusing. If you have questions, contact your ICA System
Administrator.

This is what the Entire Service History looks like *before* the Service is deleted.

All Service	e Transactions					
Select Dates		Start Date		End Date		
-Select- ~			21 🕽 23		27, 🔵 27,	Se
	Transaction Type	Date	Provider		Туре	Need Status / Outcome
🦯 👓 📩 🧋	Need	06/26/2017	Institute for Community Alliances - Wisconsin		Rent Payment Assistance	Closed / Fully Met
/ 🧃	Referral	06/26/2017	BOS Coulee Prevention Priority List		Rent Payment Assistance	
/ 🧃	Service	06/26/2017	Institute for Community Alliances - Wisconsin		Rent Payment Assistance	
19 🛌 📖 🚔	· · ·					

This is what the Entire Service History looks like *after* the Service is deleted.

Client Information				Service Transactions		
Needs	Services		Referrals	Ĭ	Shelter Stays	Entire Serv
All Service Transactions						
Select Dates	Start Date	A) 🗘 🖉		End Date	A 🔿 Z	
Transaction Type	Date	Provider			Туре	Need Status / Outo
🖊 🔊 💼 🗑 Need	06/26/2017	Institute for Community Allian	ces - Wisconsin		Rent Payment Assistance	Closed / Fully Met

• To add a referral from the existing Need, click on the envelope with the green plus sign. The Need will be from the original referral date.

	Transaction Type	Date	Provider	Туре	Need Status / Outcome
/ 🖘 🍙 🧋	Need	06/26/2017	Institute for Community Alliances - Wisconsin	Rent Payment Assistance	Closed / Fully Met

• When you re-create the referral, make sure to set the referral date back to the date of the original referral. This should be the same date as the Need date, which is listed at the bottom of the referral page.

Referral Data	
Needs Referral Date	06 / 26 / 2017 🥂 🏹 🎝 🦧 3 🗸 : 53 🗸 : 38 🗸 PM 🗸
Referral Ranking	-Select- V

• The Need Status is "Identified"

Need Status and O	Putcome
 Need Status *	Identified •
Outcome of Need	-Select-
If Need is Not Met, Reason	-Select-

• Complete the CE Follow Up sub-assessment to document the client was returned to the priority list. Scroll down and find the CE Follow Up sub-assessment box. Click Add to enter a new follow-up.

🔍 CE Follow Up			
Follow Up Date	Date of Original Referral	Outcome of Follow Up *	Notes
Add			

- Complete the follow-up information. For "Outcome of Follow Up" select:
 - Previously removed from list and then returned to list

Use the notes field to document the reason housing was not secured from your agency program. Leave the end date field blank.

Add Recordset - (72036) Test, Test	×
CE Referral Follow	Up Information	
Follow Up Date *	09 / 02 / 2016 🛛 👸 💙 💑 G	
Date of Original Referral	08 / 15 / 2016 🥂 🏹 🦉 G	
Outcome of Follow Up *	Previously removed from list and then returned to list	▼G
Notes		G
End Date (ignore)	/ / 🧖 🦁 🎝 🤯 G	
	Save Save and Add Another Cance	!

9. CANCELED REFERRAL

Referrals should be "canceled" or "declined" for one of the following reasons:

- 1. Client living with family/friends permanent tenure
- 2. Client secured housing on their own
- 3. Client obtained Section 8 or site-based housing
- 4. Client asked to be removed from list
- 5. Unable to contact client
- 6. Client declined housing offer
- 7. Death

NOTE – You no longer need to create a service transaction to document when a client secures housing with a non-HMIS agency or secures housing on their own. You should cancel the referral and select one of the above reasons.

• Go to the client file for the client you are going to remove from the priority list, and click on the Service Transactions tab.

🧃 (72036) Test, Test	
Release of Information: Expired	-Switch to Another Household Member-
Client Information	Service Transactions

• Click on "View Entire Service History" and click on the Referrals tab

Client Information			Service Tr	ansactions	
Needs	Services	Referral	5	Shelter Stays	Entire Service History

• Click on the pencil for the referral that you want to accept.

Previous Referrals										
Sele -Se	ect I	Dates	Start Dat	e En / <u>8</u> 🔿 🎘	nd Da /	te /	A 🔾 R	More	S	earch
		Need Date	Referred Date	Referred To	R	eferral utcome	Need Type		Need Status	Need Outcome
2	1	06/22/2015	06/22/2015	Madison/Dane CoC PSH Priority List - Singles			Homeless Permanent Supportive Housing		Identified	Service Pending
	-			Central Wisconsin CoC RRH						

• Then set the Referral Outcome to Declined, and enter the reason why the referral was declined. Click Save and Exit.

VI-FSPDAT Score	2 Recorded using VI-FSPDAT v2.0 on 05/05/2016 by Institute for Community Alliances - Wisconsin (2)
Referral Outcome	Declined •
If Canceled or Decli	ned, Reason Client secured housing on their own
- Follow Up Information	

10. DOCUMENTING A 90-DAY CLIENT FOLLOW-UP

• Go to the client file and click on the Assessments tab.

Client - (72036) Test, Test	
🧃 (72036) Test, Test	
Release of Information: Expired	-Switch to Another Household Member-
Client Information	Service Transactions
Summary Client Profile Households ROI Entry / Exi	t Case Managers Case Plans Measurements Assessments

• Use the drop down to find the Coordinated Entry Assessment and click submit.



• Make sure to update the client information on the CE Assessment, if necessary, including the client contact information.



• Scroll down and find the CE Follow Up sub-assessment box. Click Add to enter a new follow-up.



- Complete the follow-up information. Choose one of the following options for the "Outcome of Follow Up":
 - o 90 Day required follow up (completed), (client) still needs housing, remains on list
 - Client asked to be removed from list, secured housing on their own
 - Unable to contact client

Enter additional notes if needed. Leave the end date field blank.

dd Recordset - (72036) Test, Test	×
CE Referral Follow	Up Information	
Follow Up Date *	09 / 02 / 2016 🧖 🔿 🦧 G	
Date of Original Referral	08 / 15 / 2016 🥂 🖏 🕤 🦓 G	
Outcome of Follow Up *	90 day required follow up, still needs housing, remains on list ${\ }$	G
Notes	G	
End Date (ignore)	/ / 🧖 🥸 🦉 G	
	Save Save and Add Another Cancel	

The Follow Up Sub-Assessment is where all Follow Up related notes should be entered. You are still able to use the Need Notes in the referral, but that should be to document things like specific requirements due to disability (like needing to live on the first floor) or preferred county or location. No Personally Identifying Information should be included in the Need Notes, or Follow Up Sub-Assessment notes. To Access Need Notes:

• Click on the pencil next to the Need Information.

🖉 Need Informatio	on
Need	Rent Payment Assistance (BH-3800.7000)
Provider	Institute for Community Alliances - Wisconsin (2)
Date of Need	03/31/2016 10:14:31 AM
Amount if Financial	No amount entered.
Notes	No notes entered.

 Again, use the Need Notes field to document client information such as the client's preferred county or location for permanent housing and the number of bedrooms needed. **Remember: Do NOT include any personally identifying information (PII) in the Need Notes.**

Provider *	Institute for Community Alliances - Wisconsin (2) Search My Provider Clear
Need *	Rent Payment Assistance (BH-3800.7000) Look Up
Date of Need*	03 / 31 / 2016 🔊 ् 🤯 10 ▼ : 14 ▼ : 31 ▼ AM ▼
Amount if Financial	
▶ Notes	