



Coordinated Entry Roles within the Balance of State CoC

WI BOS Staff:

Required: The HUD [Coordinated Entry Notice](#) “establishes new requirements that Continuums of Care (CoC) and recipients of CoC Program and Emergency Solutions Grant (ESG) Program funding must meet related to the development and use of a centralized or coordinated assessment system.” “Written policies and procedures should describe how each participating mainstream housing and service provider will participate, including, at a minimum, the process by which referrals will be made and received.”

- Regularly review HMIS and Non-HMIS Prioritization lists for homeless and homeless prevention programs.
- Manage, provide technical assistance and support, monitor, and educate Supportive Services for Coordinated Entry (SSO) sub grantees/CE Leads and CE participating agencies
- Review and monitor marketing strategies, outreach efforts, and emergency service after hour plan participation
- Facilitating ongoing planning and stakeholder consultation concerning the implementation and ongoing use of CE
- Design, develop, and implement the Non-HMIS system for Coordinated Entry.
- Evaluate CE Implementation process for effectiveness and efficiency
- Identify policy and process improvements
- Determine local data collection and data quality expectations
- Work with the HMIS lead to define data sharing protocols
- Select a Data System for CE
- Establish day-to-day management structures
- Establish clear, accessible communication plan
- Promote standardized screening and assessment processes
- Develop and deliver training
- Conduct monitoring for Balance of State CE policies and procedures, grant requirements, and HUD requirements
 - For all CoC and ESG funded programs
- Develop and implement CE grievance process
 - *Required:* “The CoC’s written policies and procedures must also include a process by which individuals and families may appeal coordinated entry decisions.” HUD [Coordinated Entry Notice](#)



CE Committee & Work groups:

Required: “CoCs’ written policies and procedures for coordinated entry must: describe the standardized assessment process, including documentation of the criteria used for uniform decision-making across access points and staff. Criteria must reflect the prioritization process adopted to meet the requirements outlined.” HUD [Coordinated Entry Notice](#)

Required: “Written policies and procedures must describe the frequency of and method used for the evaluations, including how participants will be selected to provide feedback [and specify how many will be included], and must describe a process by which the evaluation will be used to update existing policy and procedures.” HUD [Coordinated Entry Notice](#)

- Must be authorized by the CoC board (*HUD*)
- Plan and implement annual CE evaluation
- Must include homeless participant feedback (*HUD*)
- Establish participation expectations
- Policies must be approved by CoC
- Includes representation from Collaborative Applicant, HMIS Lead, and mainstream service providers
 - *Required:* “the CoC should include relevant mainstream service providers in...coordinating services and assistance...and conducting activities related to continual process improvement.” HUD [Coordinated Entry Notice](#)

Institute for Community Alliances (ICA) Staff:

The HMIS Lead is responsible for managing the HMIS for the CoC's geographic area, in accordance with the requirements of the [CoC Program Interim Rule](#) and any HMIS requirements prescribed by HUD.

While the CoC retains ultimate authority and responsibility for a CoC's HMIS, the HMIS Lead is generally responsible for the administration, management, and operation of the HMIS implementation, in addition to providing end user training and meeting reporting requirements for funders.

- Develop the CE system in HMIS to meet WI BOSCO CE policies and Procedures, Homeless program standards, and HUD required data elements
- Collect data for CE
- Report on data CE
- Implement data privacy and security measures
- Monitor compliance to HMIS policies and procedures



Supportive Service for Coordinated Entry Staff:

The purpose of the CoC SSO grant is to allow local coordinated entry (CE) leads to concentrate on the coordinated entry system in their local coordinated entry system (LCES). A dedicated staff allows agencies to focus on helping clients navigate the coordinated entry system and coordinated service delivery, recommend system improvements, and continue to help expedite the process. This funding is designed to enhance the ability of the Sub-Grantee to address the following in their Local Homeless Coalition:

- Oversee the Assessment needs of people experiencing homelessness or at-risk of homelessness
- The provision of case management services to build ongoing rapport
- The provision of housing/counseling services to ensure access to a safe, stable permanent home as quickly as possible.
- The provision of outreach services to go beyond those that present for assistance but target those least likely to ask for help
- The Evaluation of the current coalition coordinated entry system, identifying areas of concern and work toward resolving barriers in the process
- The expansion of the coordinated entry system beyond the homeless service required providers to include those providers that are not required and other systems of care (i.e. school districts, hospitals, law enforcement, public housing authorities)
- Serves as the CE expert in the Local Homeless Coalition
- Ensures a consistent and accurate flow of information between the Lead Agency Board of Directors, or other designated entity, and the Local Homeless Coalition
- Must be able to run reports in HMIS
- Ensures all participating agency staff within the Local Homeless Coalition have completed the required trainings
- Attends all CE and CE Lead trainings
- Provides updates on CE system updates, changes, etc. to the Local Homeless Coalition
- Works collaboratively with the Non-HMIS List Holder (if this role is done by a different person in the Local Homeless Coalition)
- Maintains copies of all Agency Agreements and Staff Agreements for the Local Homeless Coalition
- Updates the Lead Agency training spreadsheet for participating agencies in the Local Homeless Coalition
- Ensures participating staff and agencies are complying with the CE Policies and Procedures 2.0 manual and required appendices
- Ensures marketing and outreach activities are occurring within the Local Homeless Coalition, as required
- Ensures the Local Homeless Coalition has established an after-hour plan for accessing emergency services. Ensures all relevant stakeholders are aware of the plan
- Complies with all HMIS policies and procedures
- Other duties as determined by the CoC



- While the SSO staff person is NOT responsible for CE monitoring in their local coalition, they may join the local ESG Lead Agency to assist in determining CE compliance for ESG sub grantees and provide local knowledge to WI BOS staff in support of CE monitoring

Roles and responsibilities in monitoring for CE compliance

WI BOS CE System Specialist

- Regularly monitor ESG funded agencies for compliance to WI BOS CE Policies and Procedures and its appendixes, WI BOS CE Agency and Staff participation agreements, and WI BOS Program Standards. This may include but is not limited to the following:
 - Client file review to ensure the client was enrolled in the program via CE, the client consented to participate in CE, the client was assessed and referred to CE in accordance with WI BOS policy and procedure
 - Prioritization list review to ensure that clients prioritization information is accurate and ensure they are not missing out on housing opportunities
 - Client interviews to ensure the clients are being given the information they need to make informed housing choices as well ensure they are being treated with respect
 - Staff interviews to ensure agencies have an understanding of WI BOS CE policies and procedures as well as seek their input on the CE system as a whole
- Monitor ESG funded agencies in response to CE concerns and grievances brought up by agencies, SSO staff, ICA, ESG leads, and DEHCR in accordance with the WI BOS grievance policy and procedure
- Regularly review WI BOS CE reports to ensure the CE data entered by ESG funded agencies is accurate and in accordance with WI BOS CE Policies and Procedures

WI BOS SSO for CE Staff

- Actively review CE reports in the Local Homeless Coalition to ensure that ESG funded agencies are providing follow up contacts and CE data entry in accordance with WI BOS CE Policies and Procedures. Notify the WI BOS CE System Specialist if concerns are not addressed by the agencies
- Actively review CE reports in the Local Homeless Coalition to ensure that ESG funded agencies have addressed any data entry issues that may affect a clients prioritization and their ability to obtain housing programs. If data entry issues are not being resolved, notify the WI BOS CE System Specialist
- May participate in ESG Lead agency monitoring of subs to review CE compliance if requested by the Lead agency. Report any CE concerns found during this process to the Lead agency and the WI BOS CE System Specialist
- Respond to requests for information from the WI BOS CE System Specialist as part of the process to review CE grievances, agency monitoring's, and concerns



- Promptly address issues of CE compliance with ESG funded agencies that were discovered during the CE Qtr review process. If issues were not corrected by the offending agency, notify the WI BOS CE System Specialist

ICA Staff

- Assist the WI BOS CE System Specialist during the monitoring process when HMIS information cannot be viewed by WI BOS staff
- Develop reports that assist WI BOS staff monitor compliance to CE for ESG funded agencies (ie: follow up reports, data clean up reports, shelter entries compared to CE entries reports, Etc)