

## **Reassigning Clients Policy Proposal**

### **Purpose**

To ensure that the process of reassigning clients within the Coordinated Entry System (CES) is client-centered, trauma-informed, and maintains continuity of care. This policy provides guidance on when and how clients may be reassigned to another case worker or agency, while enrolled in CE prior to being enrolled in a housing project, with the goal of preserving trust and minimizing the need for clients to retell their experiences.

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### **Policy Statement**

The Coordinated Entry System (CES) is designed to be easily accessible, reduce service duplication, and provide a seamless, client-centered experience. Initial contact with CE at an access point involves a case worker completing an intake and assessment, during which the client shares personal experiences and begins building trust. To protect clients from unnecessary re-traumatization, the system prioritizes continuity and limits the need for clients to repeat their stories.

Reassignment of clients after the initial intake is allowed only under specific circumstances and must be approved by the WIBOSCOC Staff. Each reassignment will be handled on a case-by-case basis.

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### **Permissible Reasons for Client Reassignment**

Clients may be reassigned to a different case worker or agency under the following conditions:

- The client is being transferred to another worker within the same agency.
  - The client requests a reassignment to a different agency and/or case worker.
  - The client has exhibited violent or threatening behavior toward the current case worker.
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### **Non-Permissible Reasons for Reassignment**

Clients may not be reassigned for the following reason:

- The client is transient or frequently relocates. In such cases, maintaining continuity of care is essential to support housing stability and uphold trauma-informed practices.
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## **Reassignment Procedure**

If reassignment is approved, the following steps must be followed:

**1. Consultation Between Workers:**

The current case worker discusses the reassignment with the proposed new case worker. The receiving worker must agree to accept the client.

**2. Client Notification and Consent:**

The current case worker contacts the client to:

- Inform them of the proposed reassignment,
- Explain the reasoning, and
- Obtain the client's consent.

**3. Provide Contact Information:**

The client is given the contact details of the new case worker.

**4. New Worker Introduction:**

The new case worker contacts the client to:

- Introduce themselves,
- Confirm that the reassignment reflects the client's choice.

**5. System Update:**

The reassignment is completed in the HMIS or Non-HMIS system.

- If the client is in the Non-HMIS System, the worker must contact their coalition's Non-HMIS List Holder to have the client reassigned.
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## **Documentation**

All steps in the reassignment process must be documented in HMIS under the CE Enrollment or in the Non-HMIS system's note section.