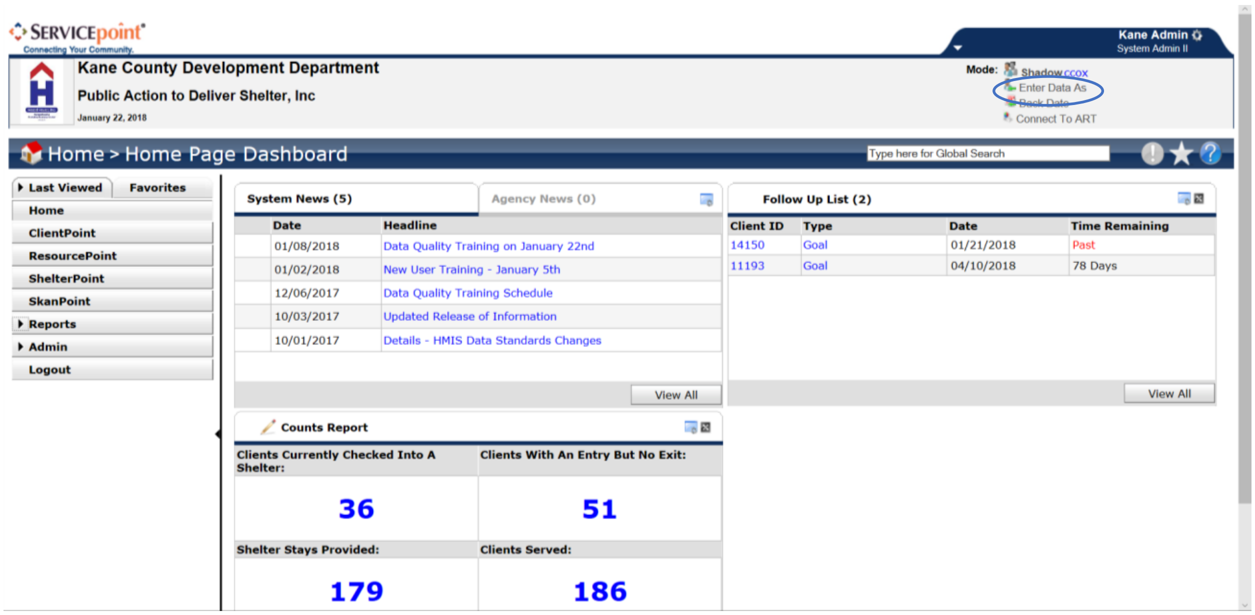
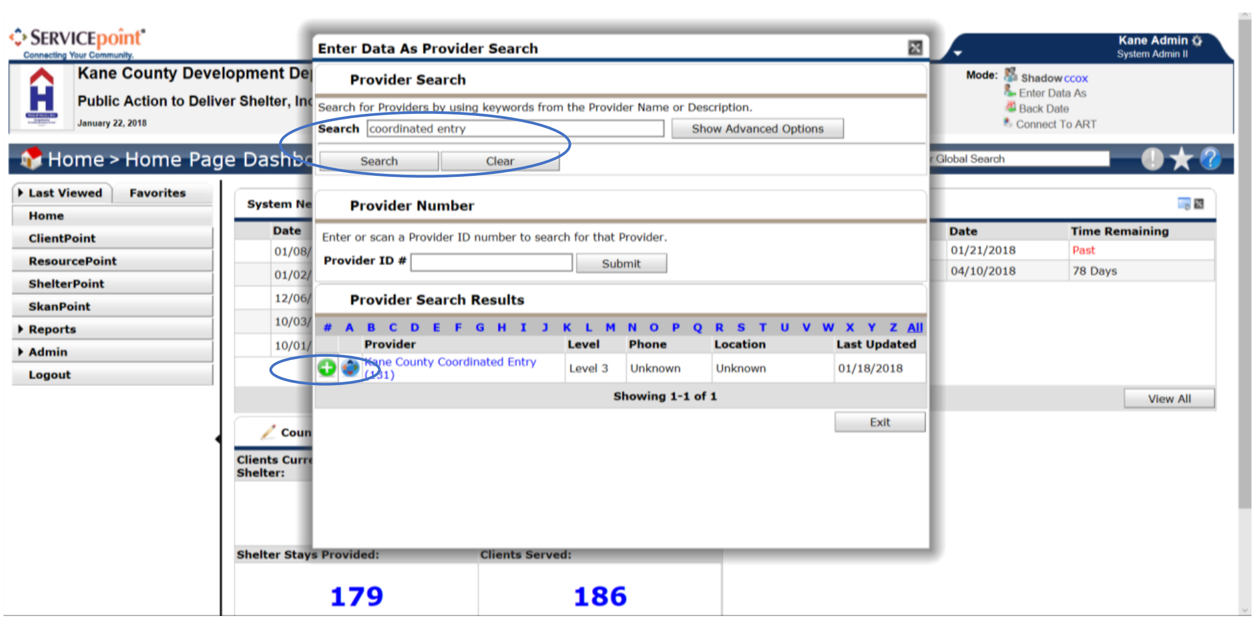
Move a Client to Housing from the Coordinated Entry Priority List (entry/exit method w/VI-SPDAT)

Step One: Enter Data As (EDA) your CoC's Coordinated Entry provider

Log in to ServicePoint and click the Enter Data As option in the upper right corner of your screen.

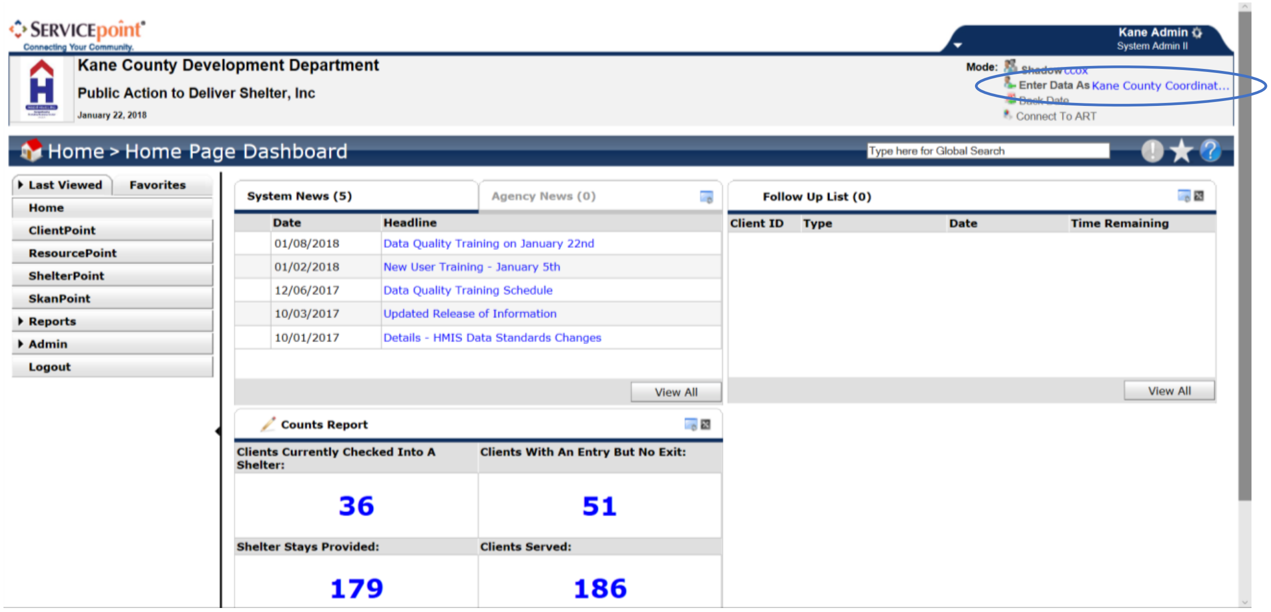


The Enter Data As Provider Search pop-up appears. Search for your CoC's Coordinated Entry provider and once search results appear, click the green action wheel with the plus sign next to the Coordinated Entry provider's name.



HOW TO…

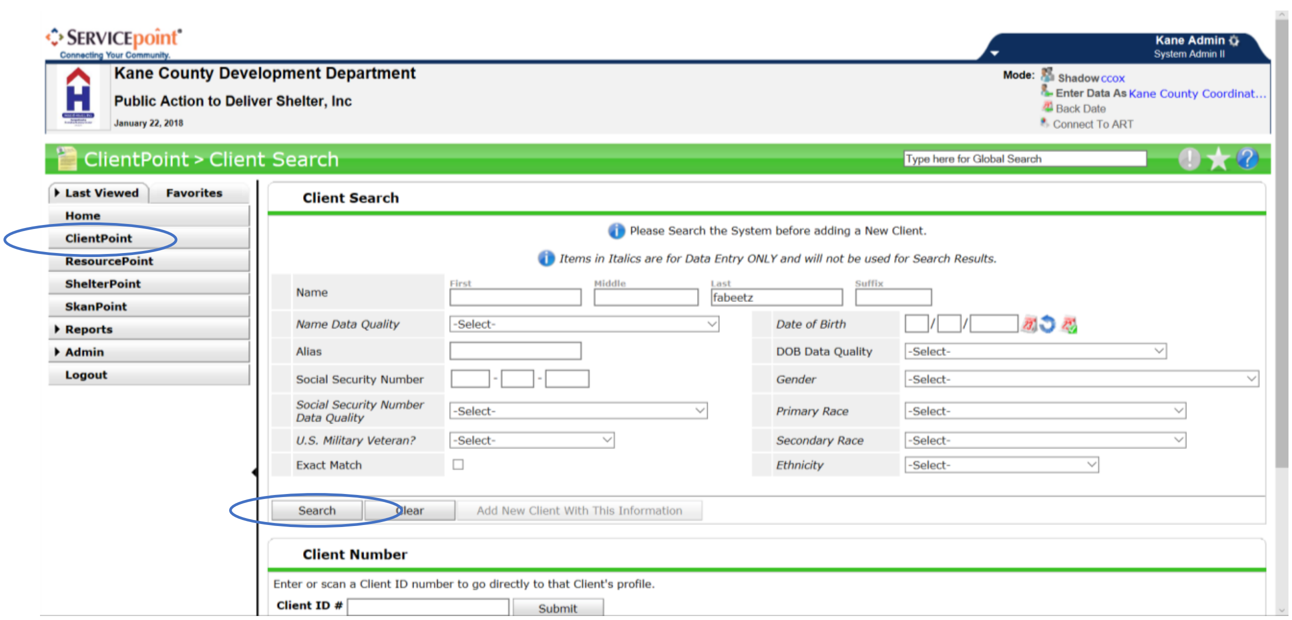
Check to make sure that the Coordinated Entry provider’s name appears next to “Enter Data As” in the upper right corner of your screen.



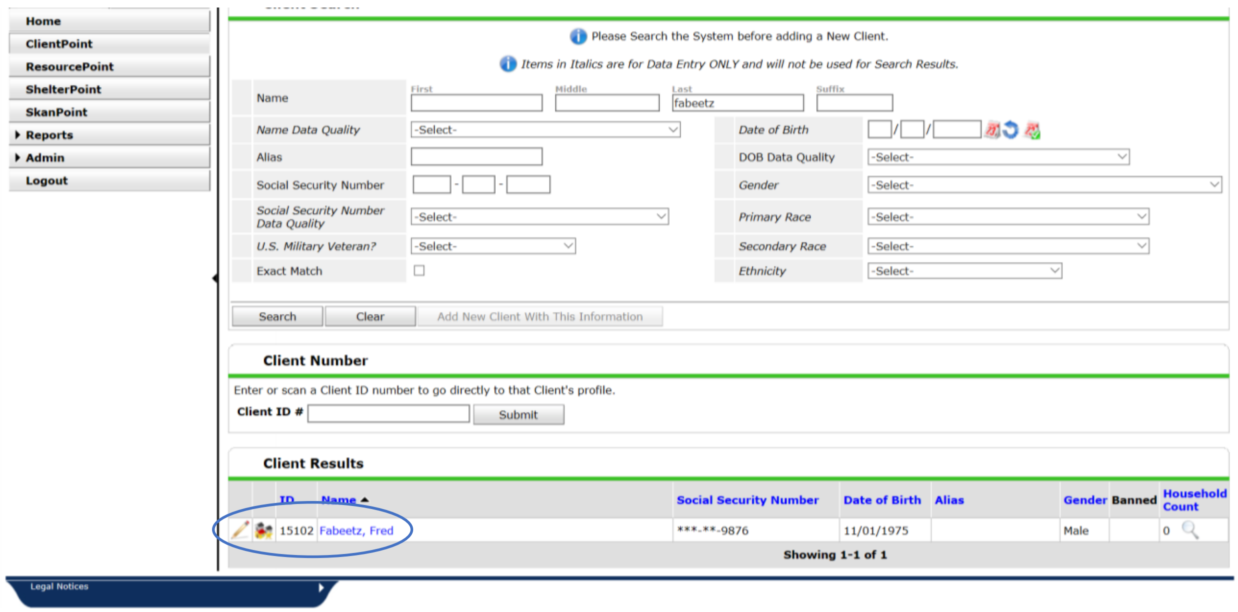
Note: to ensure that the Priority List is accurate, you must enter Coordinated Entry referrals into HMIS on the day that they occur. Should you ever need to do data entry after the fact, remember to click the Back Date link in the upper right of your screen and select the date when the client was interviewed.

Step Two: Search for a Client

Perform a search for the person you are referring to housing. Click on the ClientPoint menu item, then enter part of the person’s name in one or more of the fields in the search form that appears. After entering this information, click the Search button.

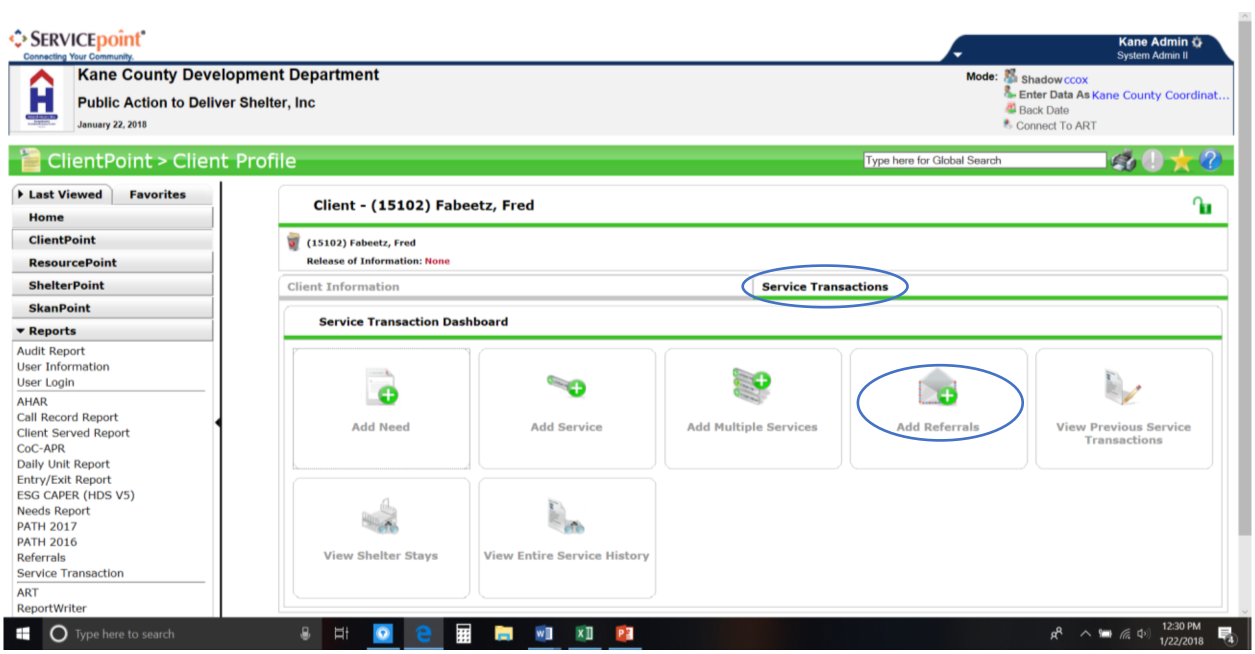


Select the client from the Client Results list.



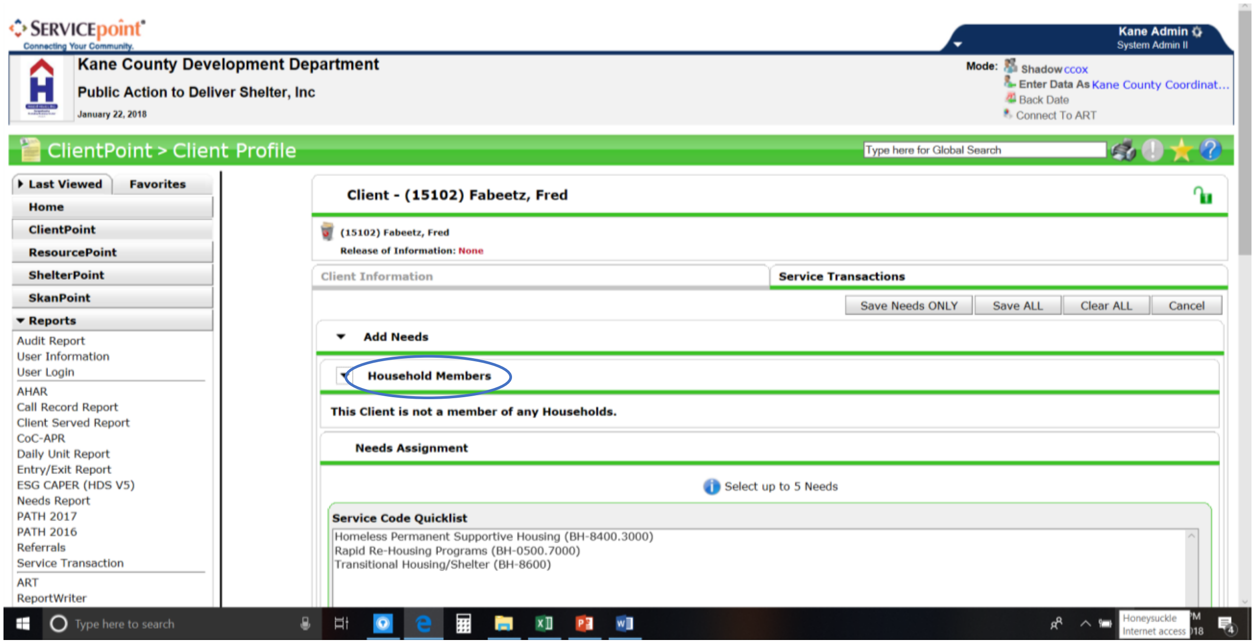
Step Three: Record a Referral

Once the Client's record appears, click on the record's Service Transactions tab, then click Add Referrals.

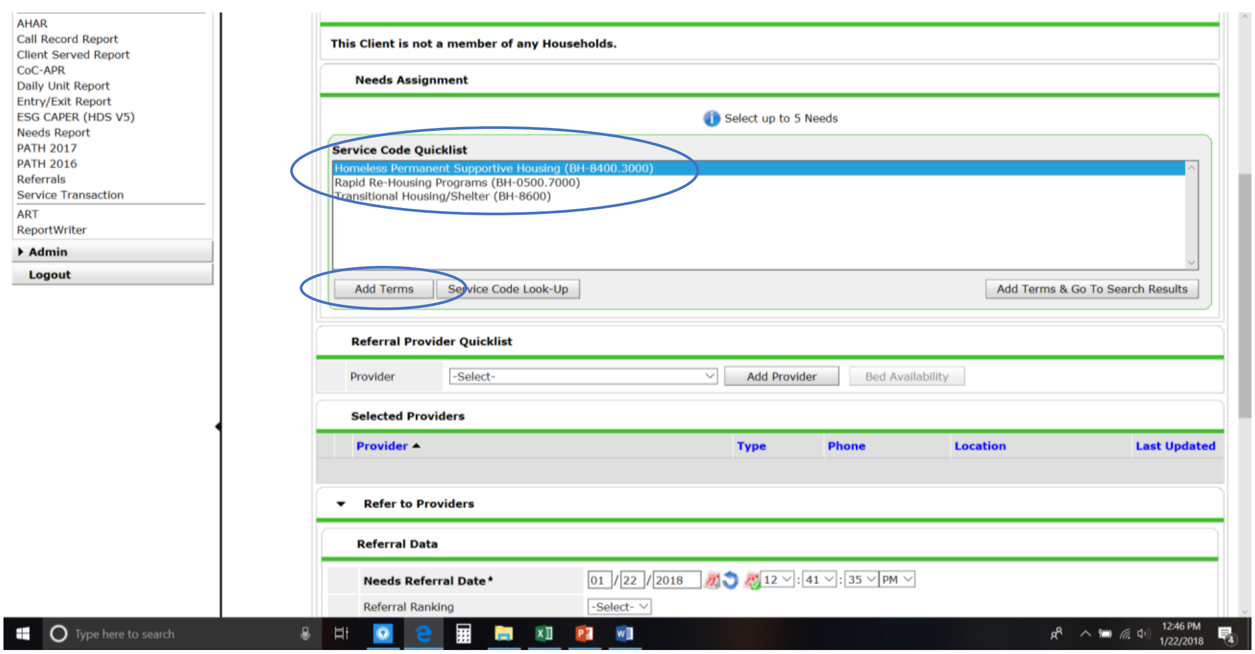


HOW TO…

The Client Services Transactions page appears. If the client is part of a multi-member household, go to the Household Members section of the page and select the people who are also being referred the current housing opportunity.

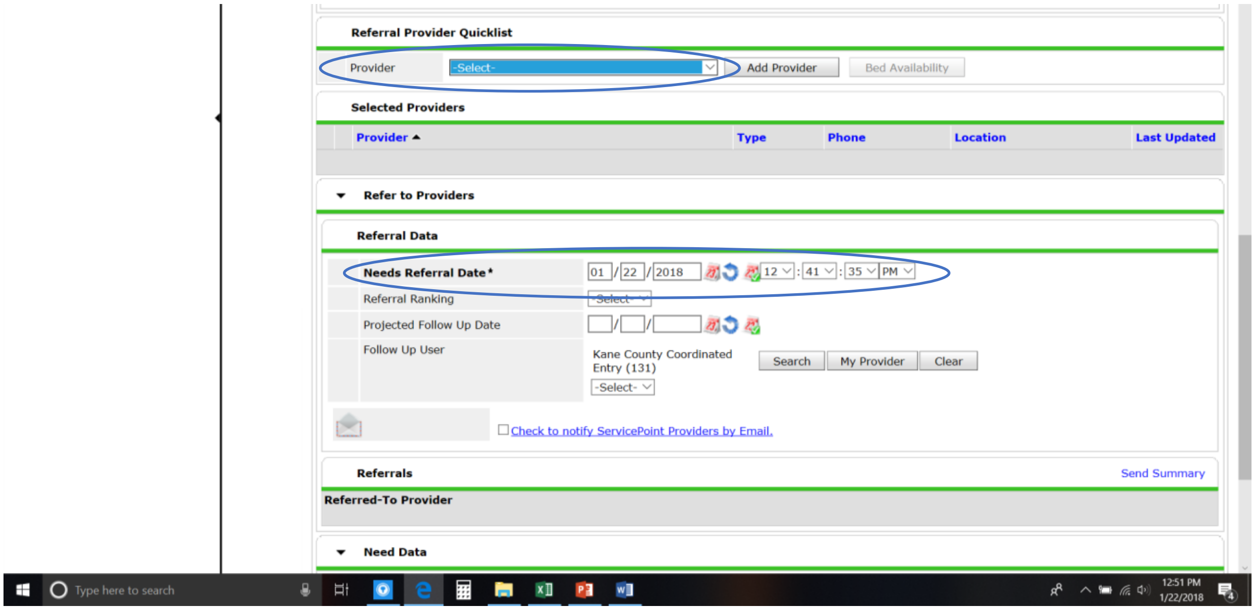


Next, go to the Needs Assignment section of the page and from the Service Code Quicklist, select the type of housing placement that the Client will receive, then click Add Terms.

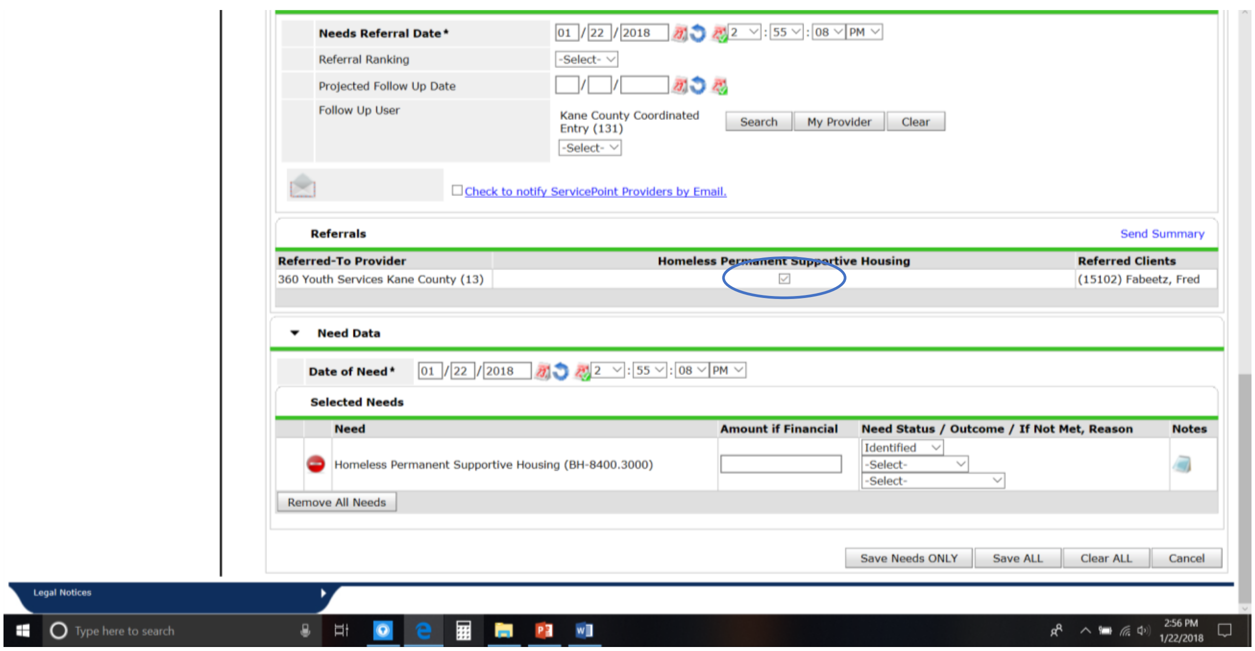


HOW TO…

From the Referral Provider Picklist, select the agency that will provide housing to the Client, then go to the Needs Referral Date field and enter the date the referral is being made.



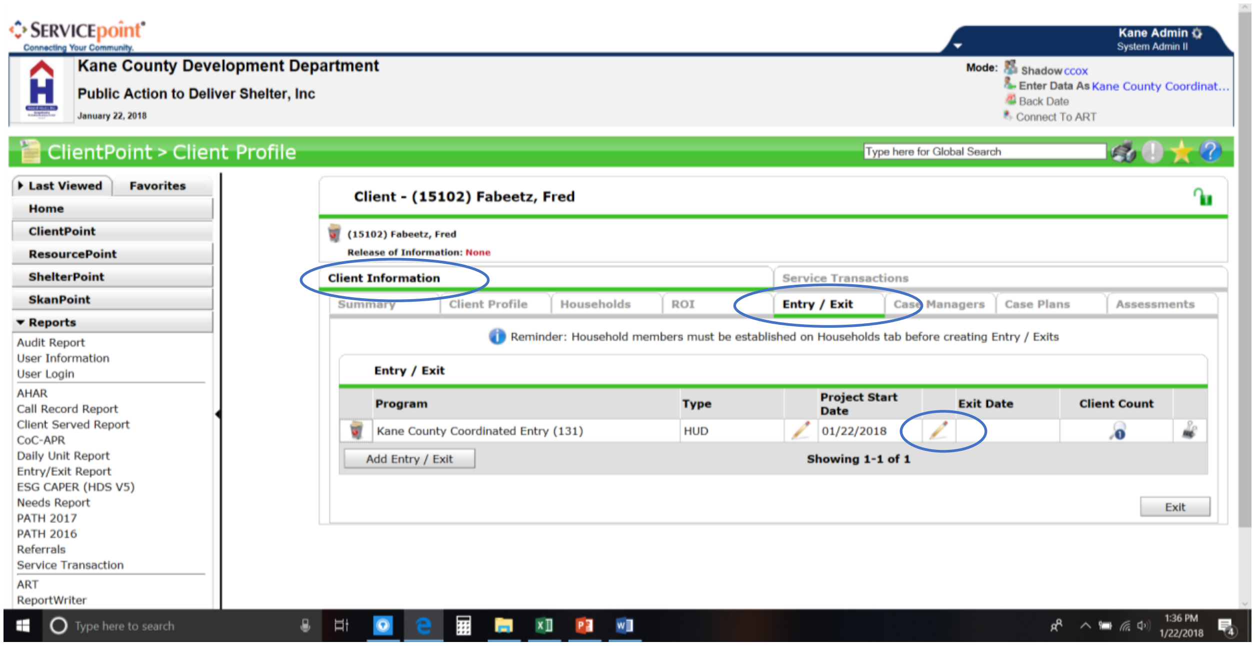
In the Referrals section near the bottom of the page, check the box in the center column that applies to each of the referrals you are making to your agency. The referral will not be saved if this box is not checked.



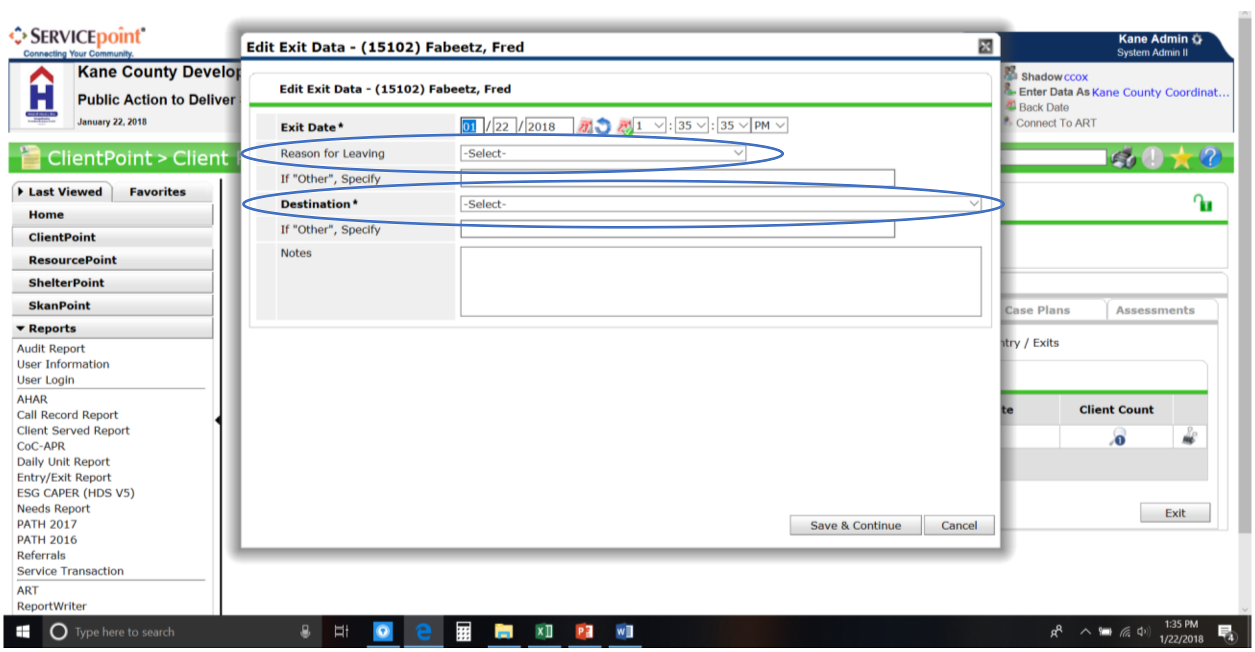
All other fields on this page are optional; you do not have to fill them out. When you are finished entering data, go to the bottom of the page and click the Save ALL button.

Step Four: Discharge the Client from the Coordinated Entry provider (program)

Click the Client information tab near the top of the page, then click the Entry/Exit sub-tab. Finally, click the edit pencil under Exit Date.

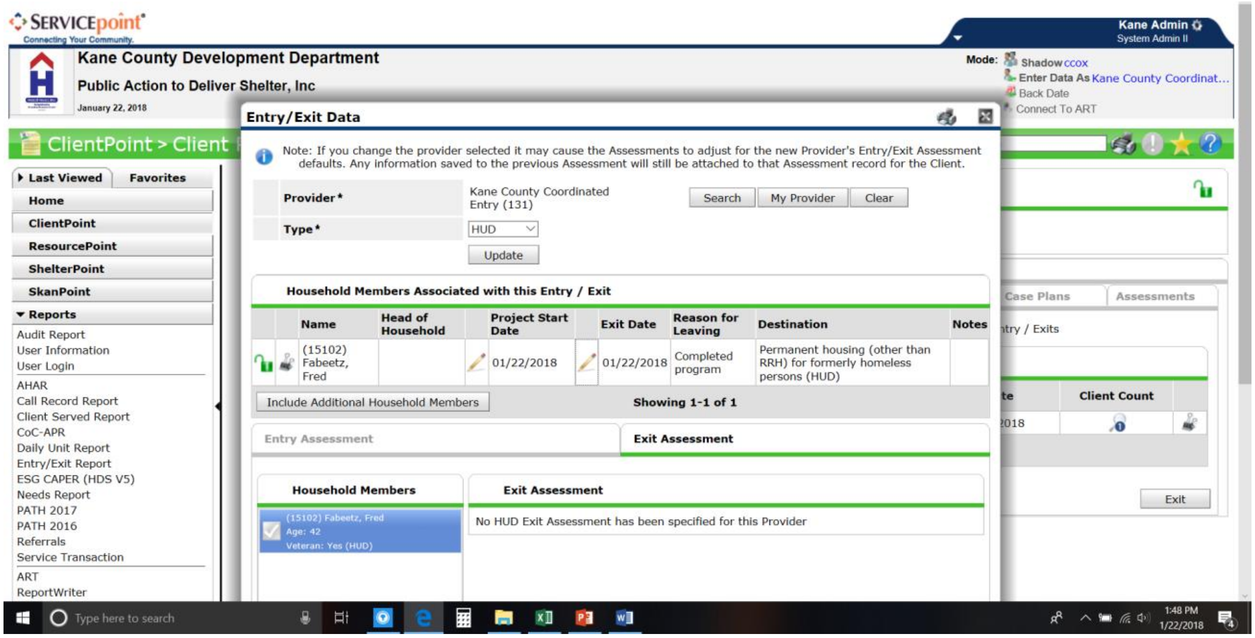


The Edit Exit Data pop-up appears. Verify that the Exit Date is correct (change if needed), and select Reason for Leaving, and Destination. Then click the Save and Continue button.



The pop-up refreshes. Click the Include Additional Household Members button if other family members are being placed in housing with the client and select those people from the list that appears.

Now go to the bottom of the page and click the Exit button. The exit process for Coordinated Entry is complete and the Client has been removed from the CoC's Priority List.



Do you have questions about using HMIS for Coordinated Entry? Call the Pathways MISI help desk at 800-536-6474 or visit help.pathwaysmisi.org.