



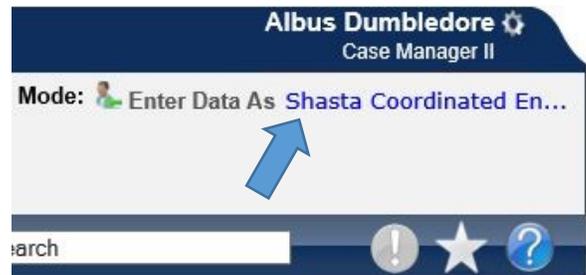
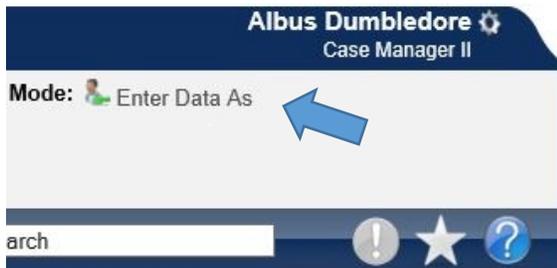
NorCal HMIS USER GUIDE – Coordinated Entry

Table of Contents

- 1) [Entering a Client into Coordinated Entry](#)
- 2) [Create an Entry in Coordinated Entry \(if needed\)](#)
- 3) [Entering a Contact in Coordinated Entry](#)

1) Entering a Client into Coordinated Entry

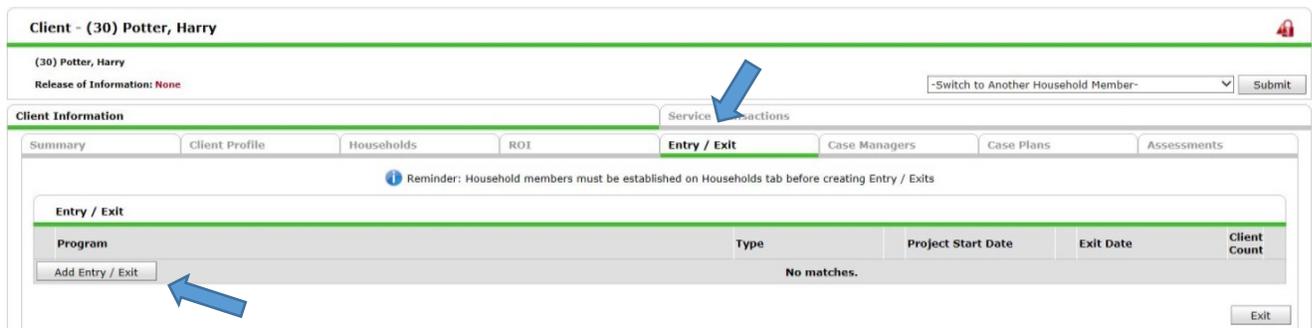
Begin by logging into the system. Before searching for a client, Please make sure you are clicking on “Enter Data As” below your name in the top right hand corner. This will pop up a provider search screen allowing you to choose **Shasta Coordinated Entry (144)**. This will be shown in the top right.



You can now click on ClientPoint in the navigation tabs to the left of the screen to search for your client. Selecting ClientPoint will bring up the client search screen. Once you find the client you are entering into Coordinated Entry, you will want to click on the Entry/Exit tab. If the client already has a completed Intake and VI-SPDAT Assessment, you can continue on to [“Creating a Referral to Coordinated Entry.”](#) If not, you will need to complete an Intake and VI-SPDAT Assessment [“Create Entry in Coordinated Entry \(if needed\).”](#)

2) Create an Entry in Coordinated Entry (if needed)

Once you are on the Entry/Exit tab, you will need to click on the “Add Entry / Exit” button.



This opens the Project Start Data screen where you will select:

Household Members – Select any additional household members that you want to include in this entry (if applicable).

Provider – This will default to “**Shasta Coordinated Entry.**”

Type – From the “Type” drop down menu, select “HUD.”

Project Start Date – The default will be today’s date.

Once completed, please click on the “Save & Continue” button. This will then take you to the Entry/Exit Data screen.

Project Start Data - (30) Potter, Harry

Household Members

This Client is not a member of any Households.

Project Start Data - (30) Potter, Harry

Provider * Shasta Coordinated Entry (144)

Type * HUD

Project Start Date * 02 / 21 / 2018 1 : 42 : 31 PM

Save & Continue Cancel

In this window, you will be able to complete the **NorCal Advanced Entry (2017) Assessment**. For a more in depth guide to completing the **NorCal Advanced Entry (2017) Assessment** please refer to the *“NorCal HMIS User Guide – Entering an Intake Form.”*

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider * Shasta Coordinated Entry (144)

Type * HUD

 Update

Household Members Associated with this Entry / Exit

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(30) Potter, Harry		02/21/2018						

Include Additional Household Members Showing 1-1 of 1

Entry Assessment

Select an Assessment

VI-SPDAT 2.0
 VI-FSPDAT 2.0
 NorCal Coordinated Entry Contacts
 NorCal Advanced Entry (2017)

Household Members

(30) Potter, Harry
 Age: 37
 Veteran: No (HUD)

NorCal Advanced Entry (2017) Entry Date: 02/21/2018 12:00:00 PM

Date of Birth 07 / 31 / 1980

 Date of Birth Type Full DOB Reported (HUD)

 Gender Male

Please note that after you complete the **NorCal Advanced Entry (2017) Assessment**, you will also need to enter the data from the **VI-SPDAT** assessment. There is a reminder at the end of the Assessment. Click on the “Save” button and return to the top of the Assessment to switch to the **VI-SPDAT** assessment.

Please do not forget to fill out the VI-SPDAT form! Click on Save and then select it at the top of the assessment.

Entry Assessment

Select an Assessment

VI-SPDAT 2.0 VI-FSPDAT 2.0 NorCal Coordinated Entry Contacts NorCal Advanced Entry (2017)

Household Members

(30) Potter, Harry
 Age: 37
Veteran: No (HUD)

VI-SPDAT 2.0 Entry Date: 02/21/2018 12:00:00 PM

VI-SPDAT v2.0

Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL

Add

Click on the “Add” button to open the **VI-SPDAT** assessment. When you have completely entered the assessment, you will need to click on the “Calculate” button to get a score and housing recommendation. Click on the “Save” button.

PRE-SURVEY	0
A. HISTORY OF HOUSING AND HOMELESSNESS	2
B. RISKS	2
C. SOCIALIZATION & DAILY FUNCTIONS	3
D. WELLNESS	4
GRAND TOTAL	11

Calculate

(8+) Recommendation: an assessment for Permanent Supportive Housing/Housing First

Save Save and Add Another Cancel

Once you have completed both the **NorCal Advanced Entry (2017) Assessment** and the **VI-SPDAT**, you will click the “Save & Exit” at the bottom right of the assessment. This will take you back to the Entry/Exit tab. You will now see that an entry has been created into Shasta Coordinated Entry.

3) NorCal Coordinated Entry Assessment

NorCal Coordinated Entry Assessment is where you will go to document (3) different processes.

Entry Assessment

Select an Assessment

VI-SPDAT 2.0

VI-FSPDAT 2.0

NorCal Coordinated Entry

NorCal Advanced Entry (2020)

NorCal Update (2020)

COVID-19

NorCal Advanced Entry (2020)

1. Current Living Situation- Anytime you come in contact with your client and they have a different living situation from when you entered them into the program, you will “ADD” and document the updated living situation in this area. This assessment is required by HUD. **Use the form labeled: HMIS Intake for ES,SO, CE Current Living Situation.**

NorCal Coordinated Entry
Entry Date: 03/31/2020 11:21:39 AM

Required by HUD for CE, Street Outreach and Emergency Shelter

Current Living Situation

		Start Date *	End Date	Information Date	Current Living Situation
		10/30/20 #1			

Add
Showing 1-1 of 1

Coordinated Entry Event

Start Date *	Date of Event *	Event *	Referral Result	Date of Result
#2				

Add

2. Coordinated Entry Event- This assessment is where you will document any referral to a program. This assessment is required by HUD. Use the Form Labeled: Coordinated Entry Event- Required fields

Add Recordset - (1) TEST!!!!, Lucy (TEST)

Coordinated Entry Event

Start Date *	<input type="text" value="03"/> / <input type="text" value="31"/> / <input type="text" value="2020"/>	   G
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	   G
Date of Event *	<input type="text"/> / <input type="text"/> / <input type="text"/>	   G
Event *	<input type="text" value="-Select-"/> G	

If 'Event' answer was 'Problem Solving/Diversion/Rapid Resolution intervention or service result', please answer the following question:

Problem Solving/Diversion/Rapid Resolution intervention or service result - Client housed/re-housed in a safe alternative	<input type="text" value="-Select-"/> G
---	---

If 'Event' answer was 'Referral to post-placement/follow-up case management result', please answer the following question:

Referral to post-placement/follow-up case management result - Enrolled in Aftercare project	<input type="text" value="-Select-"/> G
---	---

If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:

Location of Crisis Housing or Permanent Housing Referral	<input type="text" value="-Select-"/> G
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If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:

Referral Result	<input type="text" value="-Select-"/> G
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If 'Event' answer was a Referral to an ES, TH, Joint TH-RRH, RRH, PSH, or Other PH opening, please answer the following question:

Date of Result	<input type="text"/> / <input type="text"/> / <input type="text"/>	   G
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1. CE Processing – This is where it is documented the processing of the client in Coordinated Entry. When you enter the new client, document in the “Priority List Status: Enters CES”. Any contact with the client or documentation is received, it is noted in this area of the record. **Use the Form Labeled: Coordinated Entry Event- Optional fields**

2.

CE Processing

 Priority List Status  

Permanent Housing Path  

Date of Housing Plan Track / /    

Date of Housing Program Eligibility / /    

Expected Permanent Housing Date Achieved / /    

 **Coordinated Entry Contact Notes**

	Date of Contact	* Type of Contact	Staff Name	Location contact was made	Contact Notes
 	03/14/2019	In Person	Julie	In the park	let Scooby know his voucher was approved and he can start searching
 	09/20/2018	In Person	Torri Cardilino	Bridge	

Showing 1-2 of 2

 **Housing Intervention Offers**

	Date of Housing Offer	* Type of Housing Intervention Offered	Was the housing offer accepted?	If PH option was not accepted, indicate why client decline offer	Date housing offer was accepted or declined	Housing offer notes
 	03/14/2019	TBRA	No	Not big enough	03/14/2019	needs two bedroom, only one bed unit available.
 	09/20/2018	ESG-RRH	No	Not big enough	09/20/2018	The client wants a 10 bedroom, 5 bath villa overlooking Lake Shasta
 	09/20/2018	Other PSH				

Showing 1-3 of 3

Last Updated: 4/1/2020