Appendix G

Coordinated Entry Process- HMIS WorkFLow

1. Log into Client Track on the internet (e) at www.clienttrack.net/hrn **Click Green Arrow**
2. In the search box, enter**" the first two letters of the client's first and last name"** to see if the client is already in the system. If the client is in the system, the name of the client will appear. Click the client's name then attach the CE Intake to their files.
3. If the client is not in the system select the star on the top left page, complete the first three pages only. Page 1 will be the client's Basic Information proceed by entering client demographic information, which will include. First and last name, Social Security Number, Gender, age, Also with Ethnicity, and Race choose **"Data not collected** select "Finish".
4. Page 2 will be the client family's information select **"CLOSE\ SAVE",** and page three will be Program Enrollment select **"PROJECT",** which will be Coordinated Entry then select **"SAVE".** "STAY ON THIS PAGE"! **Click the X located below their gender to close out workflow then click yes and it will close out the workflow for that client.**
5. **"IF CLIENT IS IN SYSTEM attach file ONLY"** .To attach files go to the Left top of pg. Which is the Menu Bar click, and stroll down to Case Management underneath select **"Edit Client".** Once the page changes to Edit file page, **"Click add files"** and, then**" Choose Files"** which will open the browser to attach **CE Intake** and select Save\Close.
6. **CE Intake** files are located on the **S drive**. Click on the S drive stroll down and click on **"Allocations".** On the next Page, **click CE** at the top of page, next scroll down **Coordinated Entry Referrals** the list will open up. At the top right of the page there is a search box enter the last name, and that client CE Intake will appear click it ,and it will attach to client's files.
7. Right below **"Intake"** to the right click on the **X** to close out the process. If you have not attached the file it is ok to go back an attach it. Repeat step 6.
8. To complete the VI-SPDAT Assessment.
9. Go back to the menu bar and "**Click on Assessments"** then stroll down to **VI-SPDAT**. Call the client from the number that is on their file, and proceed with the assessment. If you do not get an answer, please leave a message. Something like this. "Hello my name is (your name) from HFG." I am trying to contact (Client's name). I am in the process of reviewing your CE Intake. I would like to ask you as series of question that could possible help refer you to an agency that could meet your needs. Please return my call. My number is 706-327-3255 ext. 219 "." **Thank-you"!**
10. – Next Add to your Calendar for the next three days as a reminder to you to contact the client to complete the VI-SPDAT. Go back to the menu bar **"click CASE NOTE",** to the right top **"click ADD NOTES",** and add your note then. In the regarding box put CE for Coordinated Entry **"Click Save".** To edit your notes hoover over the pencil, and make necessary changes.
11. Within eight (8) Calendar days if you have not received a return call from the client close out the referral, and note it in client track.