

## Model

- Determine what agencies and program will collect data

## Screens

Decide on an enrollment and exit screens for programs collecting coordinated entry data.

- HUD standard or minimum screens or custom screens
- Configure screens if needed

## Templates

- Add the enrollment screen to the template
- Add the exit screen to the same template
- Enable the Current Living Situation in the template

## Assessments

Decide on an assessment(s).

- Use the pre-configured VI-SPDAT assessments or create a custom assessment
- CE Toggle= **On** (for applicable assessments)
- Eligibility Engine= **On**
- Configure an assessment processor, if needed
- Select the Assessment Processor on the assessment screen
- Enable assessment screen settings (i.e., Recent Assessment Warnings)
- Customize the assessment location field in the Field Editor
- Enable CE assessments for agencies doing CE data collection
  - Set Assessment Usage to **Programs Only**
  - Enable cascading, if desired



# Coordinated Entry Configuration Checklist

The Coordinated Entry Configuration Checklist guides you through configuration for the commonly used workflows and aligns with the HUD Coordinated Entry Data Standards. For more information about any of the components below, please visit the Help Center.

## Programs

### *For program completing CE assessments:*

- Configure/update programs that will collect CE data
- Add the CE template to the program
- On the right sidebar, add Community Queues to the program
- Enable program settings
  - Consider using Auto-Exit due to Inactivity, Auto-Exit to Permanent Destination, & Cascade Assessment Data
- Add the CE assessments to the program
  - Add assessments to the Program Assessment section
  - Add assessments to the Cascade Assessments section

### *For programs receiving CE referrals:*

- Project Receives CE Referrals: **On**
- Public Listing: **Public**
- Eligibility toggle: **On**
- Add Responsible Staff Members
- Availability: set to **Full** or **Limited Availability**

## Coordinated Entry Events

- Enable Inferred CE Events under Referral Settings (if applicable)
- For programs completing CE data collection, Coordinated Entry Events: **On**
- Configure manual events for programs entering manual events

## Referral Settings

- Edit or create Referral Settings
- Enable Community Queues, if desired
- Enable multiple queues, if desired

## Access Roles

- Create or edit access roles
- Ensure access roles have the correct permissions to perform CE work

For more information about Community Queue configuration, please see the Community Queue Configuration Checklist.