Coordinated Entry - Instructions on How to Reopen a Client's Enrollment in Housing Problem Solving or Coordinated Entry if Exited Incorrectly

At times an individual or household may be exited from Housing Problem Solving (HPS) or Coordinated Entry (CE) incorrectly, this sometimes happens as a result of auto-exit. In HPS, this happens if someone is still receiving housing problem solving services but they were not correctly documented. In CE, this happens if someone is in touch with a provider and is eligible to be on the crisis and/or housing queue but for whom a qualifying entry, typically a current living situation assessment, has not been entered in the last 6 months. Anyone active on either the Crisis or Housing Queue should have an active Coordinated Entry enrollment. It may also happen that someone was auto-exited but you have information to complete a manual exit.

Auto-exits should be prevented whenever possible. If someone should be exited and you have any information about their status or what their status was when they should have been exited, please complete a manual exit (instructions on updating exits below). As a reminder, auto exits default to data not collected which creates data quality issues and does not capture the important work you are doing or the reality of people's situations.

Reopening a Client to HPS or CE Enrollment

1. Ensure Agency is set to CE - Coordinated Entry
   a. Use the agency switcher located under your name in the upper right
   b. Select CE- Coordinated Entry

2. Search for and open the Client Profile.

3. Click on the client's PROGRAMS tab

4. Click "x Exit"
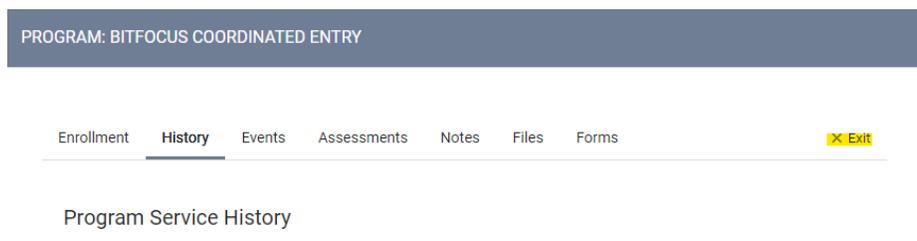
5. Scroll to the bottom of the page and click "Reopen Client Program"

6. There will be a pop up to confirm, click "SAVE".

7. There will be an additional pop up with a reminder that it will not modify and client service end dates, click "OK".

8. If you scroll back up, you will see that the exit date is removed and the client is again active in the program.

9. <u>Now you must document at least one qualifying entry so that the person remains active. This step must be completed.</u>

   a. In HPS, this typically means entering an event. Enter any events that were not previously documented correctly, including housing problem solving sessions. See AC Events Quick Guide 12.19.22.pdf.

   b. In CE, this means entering current living situation assessments for any months since enrollment that there was an encounter with the individual and for which a current living situation assessment has not been entered.

NOTE: Additional questions may populate based on the client's responses.

Updating an Exit

1. Ensure Agency is set to CE - Coordinated Entry
   a. Use the agency switcher located under your name in the upper right
   b. Select CE- Coordinated Entry

2. Search for and open the Client Profile.

3. Click on the client's PROGRAMS tab

4. Click "x Exit"

PROGRAM: BITFOCUS COORDINATED ENTRY

Enrollment   **History**   Events   Assessments   Notes   Files   Forms   ✕ Exit

Program Service History

5. Update the Project Exit Date and Destination to the correct date and destination. Update any other information in the exit that is incorrect, scroll down and click "SAVE & CLOSE"