

Completing an Enrollment

To enroll a client or household in a program, click the *Programs tab* in the client record. The tab contains two sections: *Program History* and *Programs: Available.(figure 1)*

PROGRA	AM HISTORY				
	Program Name	Start Date	End Date	Туре	
i Z	Emergency Shelter w/ Reservations Emergency Shelter: Entry/Exit Date Adam Test Agency 👔	06/08/2020	Active	Individual	
	Marin FEMA NCS Program Marin County Training Agency (05/14/2020	Active	Individual	
PROGRA	AMS: AVAILABLE				
Blue	Family Shelter				

figure 1

Click Enroll (figure 2). Please note: Data quality and completeness is important. Please try to avoid using "Data Not Collected, "Client Doesn't Know" or "Client Refused" when possible.

Coordi	nated Entry Program (Marin)				^
	PROGRAM DESCRIPTION:			Active Clients	
	This is Coordinated Entry Self-Assessm Community Queue and Outcome Report		NI-SPDATα,	6 CLEMTS 0 % Families 1 100 % Individuals	
3	Funding Source HUD:ESG – Street Outreach Availability Full Availability	Service Categories:	✓ RHY Service	✓ Coordinated Entry Event	
ĥ	DOC REQUIREMENTS				ENROLL



Full instructions on how to complete a program enrollment can be found here.

Current Living Situation

The purpose of the Living Situation Assessment is to regularly document the current living situation of people experiencing homelessness and to document homeless chronicity.



For Coordinated Entry, record a CLS anytime any of the following occurs:

- 1. Project start (enrollment into CE)
- 2. A CE Assessment or CE Event is recorded; or
- 3. The client's living situation changes

Click the program level Assessment tab. Click *Start* next to the Current Living Situation Assessment. *(figure 3)* Click Add Current Living Situation. *(figure 4)*

PROGRAM: ECS: BAYVIEW ACCESS POINT		
Enrollment History Provide Services	Assessments Notes Files Forms	× Exit
Assessments Current Living Situation		LINK FROM ASSESSMENTS
	Figure 3 ADD PROGRAM ASSESSMENT Pita Pocket Grandchild ADD CURRENT LIVING SITUATION	

figure 4

Full instructions on how to complete a Current Living Situation Assessment can be found here.

Coordinated Entry Assessment

Prior to completing an assessment, you should check the client's history tab or profile screen to see if they have already completed an assessment.

Open the Coordinated Entry enrollment, click the Assessment tab. (figure 5)

PROFILE HISTO	RY SERVICES	PROGRAMS	ASSESSMENTS	NOTES	FILES	CONTACT	LOCATION	
PROGRAM HIST	ORY							
Program	n Name			Start Date	9	End D	ate	Туре
Coordir	nated Entry Prated Entry	ogram ed Entry Agency (0	07/06/2	020	Activ	e	Individual



figure 5

Click *Start* for the applicable assessment. (figure 6)

Enrollment History Provide Services Assessments Notes Files	× Exit
Assessments	LINK FROM ASSESSMENTS
VI-F-SPDAT Prescreen for Families [Marin]	START
VI-SPDAT Prescreen for Single Adults [Marin]	START
VI-Y-SPDAT Prescreen for Transition Age Youth [Marin]	START
[Revised] VI-F-SPDAT Prescreen for Families [Marin]	START
[Revised] VI-SPDAT Prescreen for Single Adults [Marin]	START
[Revised] VI-Y-SPDAT Prescreen for Transition Age Youth [Marin]	START



Referral to the Community Queue

Family Shelter ONLY: Families in need of shelter should be referred to the Family Housing Queue at the time they complete an assessment. For other types of housing and for other populations, Clients will be referred to the Active List during case conferencing

	Enrollment	History	Provide Services	Assessments	Goals	Notes	Files	Chart	Forms		× Exit	
PR	GRAM ELIGIB	ILITY DETI	ERMINATION									
	Marin Scor HISTORY OF HO RISKS		Iary OMELESSNESS		N	Aarin PRE	-SCREEN	TOTAL	0		D D	
	Famil	e Queue y Shelter Qu LY TO COMM		•	_							

figure 7



REFERRAL: ADD TO CQ	
Send to Queues	Family Shelter Queue
Referred Program	Community Queue
Referred to Agency	Community Queue
Referring Agency	Marin County Training Agency
Private	
B I I II II	
	Notes are optional
	SEND REFERRAL CANCEL

figure 8

Coordinated Entry Event Services

A "Referral to Housing Needs Assessment" service should be recorded every time you enter a Coordinated Entry assessment. *(figure 7)*

Enrollment History	Provide Services	Assessments	Goals	Notes	Files	Chart	Forms	× Exi
Services								
Briefing to Client								Coordinated Entry Event \checkmark
Coordination with Case Manager								Coordinated Entry Event \checkmark
Document Ready								Coordinated Entry Event \checkmark
Housing Search								Coordinated Entry Event \checkmark
Landlord Engagement								Coordinated Entry Event \checkmark
Referral to Coordinated	Entry Housing Needs A	ssessment						Coordinated Entry Event 🗸

figure 9

Full instructions on how to complete services can be found here.