UNITY Coordinated Entry GUIDE

Workflow is the same (Sort Of)

1. Search your client (If you need to add a client to the system you will make sure to add the Name/DOB/SSN/Race/Gender, etc.)
   > Make sure to create the household if the client has family members needing assistance with that head of household member.
2. ROI's (Release of Information)
   > If you create your household first, then you can link the whole household to the ROI.
   > Give the client 3 to 5 years on those ROIs to allow the COC time to have access to the client's data.
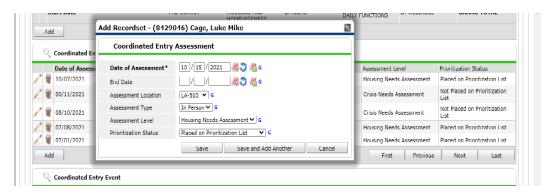3. If you do ***VI-SPDATs*** you will do that on the client summary page
   a. Do not Forget to fill out the ***Coordinated Entry form*** with your email/telephone number/Program/Client's VI-SPDAT Score/Client Have Homeless Documentation (Once completed)
   b. Must Answer Primary Reason for Being Homeless/Is the client a Jefferson Parish Resident? (This Question identifies Orleans vs Jefferson Parish Residents that access the system)
4. Fill out an **Entry Assessment** for the clients (Remember to Backdate/Enter Data As for your specific program if need to)
   a. Remember to do full assessments on all your clients. Make sure to answer the relationship to the head of household question in the entry assessment as well.
   b. Make sure the head of household has the following completed: **/Coordinated Entry Assessment/ Current Living Situation /Coordinated Entry Event** filled out to be able to pull on the new Coordinated Entry Report.
5. Click the client profile tab to fill out the information for those clients that received vaccinations. ***(Partial are also required to add to the assessment too).***
6. Then do your updates in "interims" (Adding Income/Non-Cash Benefits/Health Insurance).
7. Then exit the client at the appropriate time.

More In Depth Information on the New Assessments that needs to be answered….

Importance: **Coordinated Entry Assessment**
   a. If you do not have this assessment filled out for the head of household, then the client will not show up on the report meaning they won't be counted in the system-wide Coordinated Entry process.
   b. Assessment Level: Housing Needs Assessment for clients needing to be housed and those clients that are not trying to be housed can be Crisis Needs Assessment
   c. If clients are being navigated to **HOUSING**, please make sure to add "Placed on Prioritization List". Anything else outside of housing will be considered "Not Placed on Prioritization List".
   d. You must add a Coordinated Entry Event for all clients that rollover to the new grant year if the client is still open and still needs assistance. For Example, Luke Cage has a project start date of 4/27/2021. I fill out the assessment and add a Coordinated Entry Assessment for 4/27/2021. It's now July 3rd, 2021, and when I run the Coordinated Entry APR I noticed the client is not on my report for the starting Grant year of 7/1/2021. I must go in and add another Coordinated Entry Assessment for 7/1/2021 so that (carryover) client now shows up in the new granting year.

Importance: **Coordinated Entry Event**

A. VI users: If you will be working on trying to house the client YOU MUST DO A COORDINATED ENTRY EVENT AND SET THE EVENT TO "REFERRAL TO SCHEDULED COORDINATED ENTRY HOUSING ASSESSMENT".

B. Problem Solving for Coordinated Entry users: If you will be working in this grant your event will be Problem Solving/Diversion/Rapid Resolution Intervention or Service.

C. Referrals to ES/RRH/PSH/PH/TH users: Must do the referral and add the program you are referring to. Once the referral is on the client's profile, then that housing program will then go in and accept or deny the referral. If a referral is denied for whatever reason, please make sure to add that to the referral results and complete a new event to show the referral being made to another Agency/Program.