Balance of State Coordinated Entry Workflow Cheat Sheet / Quick Guide

When to Create Notes

- When the client prioritizes and you are contacting them
- When you have met with them and they agree to be in the program
- For TBRA (that is not matching RRH), when you have begun working with them and they are searching for an apartment
- When you have completed a follow up
    - Made contact
    - 3 times of no contact, you should include this in the note include that you are exiting them for no contact
        - You can create one note and edit it by adding each date of attempting to contact. If the client calls back soon after you've left a message for them, you can edit the note to include that information. Put notes, dates and times in the note for clear communication.

When to Reassign the Referral

- Log in under your agency and send the referral to your agency when they are found eligible and accepts the program

When to Create the Agency Program Enrollment

- Log in under your agency
    - Rapid Rehousing and Permanent Supportive Housing: the client accepts the program, and you have told them to start their housing search
    - Prevention: when the client accepts the program, and you've started services with them
    - Transitional Housing: when the client moves into the unit

- TBRA –
    - if set up as a Rapid Rehousing project or being used to match a RRH project: the client accepts the program, and you have told them to start their housing search.
    - If not set up as RRH: when the client moves into the unit

When to Close the CE referral

- Not enrolled in a program
  - When you contact the client and they state they are housed or no longer wish to be on the list
    - You must also close the CE enrollment at this time.
  - When you are unable to contact the client after 3 follow up attempts
    - You must also close the CE enrollment at this time.
- Enrolled in a program or will be enrolled
  - The referral will change status automatically after you reassign to your agency's program.
    - The referral will show as accepted when you create the enrollment into your program.
    - When creating your program enrollment be sure to toggle on the attached referral.

When to Close the CE enrollment

- For RRH and PSH the CE enrollment will automatically end date (should, but double check to be sure) once you've added the Housing Move in Date
- For Prevention, Transitional Housing, you will need to go in and manually exit the client from the CE enrollment
- TBRA –

        - if set up as a Rapid Rehousing project or being used to match a RRH project: the CE enrollment will automatically end date once you've added Housing Move in Date
        - If not set up as RRH: you will need to go in and manually exit the client from the CE enrollment when the client moves into the unit

When to Re-add the CE Referral

- When a client exits a program and is not housed.
- If you previously end dated it, but they still need to be on the priority list

When to Re-open the Enrollment

- If the CE enrollment was closed and the client re-appeared for services within 30 days, it can be reopened.
    - Be sure to also refer back to the queue

*If you are using TBRA funds to match EHH RRH, they need enrollments in both programs on the same date and the referral needs to be attached to the TBRA program.