

Madison/Dane CoC Coordinated Entry HMIS Guide

Institute for Community Alliances, September 28, 2026

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PREAMBLE – THE REIMAGINE CE PROCESS AND GOALS 2023-2025

In response to challenges facing the HSC's Coordinated Entry system including insufficient housing opportunities, questions about racial equity and local and national criticism of the VI-SPDAT an HSC workgroup was established in 2023 analyze the system and recommend changes. Additional information on the efforts of the Reimagine CE Workgroup can be found on the [HSC website](#). While it was beyond the scope of the workgroup to address the housing shortage, the changes being implemented in 2025 are expected to create a more efficient, trauma informed, and equitable coordinated entry system. Significant changes include:

- Everyone with an active enrollment in a street outreach or overnight emergency shelter project are automatically assessed for the first tier
- Increased reliance on 3rd party data
- Increased attention on those known by our system to be experiencing literal homelessness
- More focus on housing navigation

The following guide documents the new CE workflow. Some things are staying the same, but many things are changing from how things have worked in the past.

INTRODUCTION

The Madison / Dane County Coordinated Entry system is designed to identify households experiencing homeless in our community, connect them with housing navigation supports, and prioritize the most vulnerable households for placement in the HSC's limited housing resources. This workflow guide complements the Madison/Dane CoC's Coordinated Entry Policies and Procedures available on the Homeless Services Consortia's website. Following this workflow will ensure agency staff comply with those policies and that clients are appropriately considered for and connected to housing opportunities through all stages of the coordinated entry (CE) process. Additional information about the Madison/Dane CoC Coordinated Entry Process can be found here:

[Madison / Dane CoC - ICA-Wisconsin Help Center \(helpscoutdocs.com\)](#)

➤ Coordinate Entry Data Entry For All

The Madison / Dane CE uses a tiered approach with all clients enrolled in a Dane County Emergency Shelter (ES) or Street Outreach (SO) project, including at DV shelters, considered during tier-1 prioritization. The tier-1 process looks at a client's HMIS history and their responses to the Madison / Dane CoC Coordinated Entry questions on the ES or SO enrollment screen to make an immediate, but approximate, assessment of their household's vulnerabilities and barriers to housing. This information is used to determine who is invited to complete the more thorough, but invasive, Tier-2 assessment and, eventually, may be prioritized for services from our limited pool of housing providers who reserve units for those exiting from homelessness. All staff at HSC Emergency Shelter and Street Outreach projects that meet with clients and perform intakes must be trained in the data collection expectations for program enrollment into HMIS including the Madison / Dane CoC Coordinated Entry question. Additionally, agency staff with an HMIS user license that has completed the prerequisite Coordinated Entry trainings can assist a household with the tier-2 process in HMIS. Any client contacting a Coordinated Entry participating agency that is experiencing literal homelessness should be connected to appropriate shelter or street outreach providers so ensure that client is also connected with CE housing services. Requirements for Coordinated Entry in HMIS:

1. Tier-1 The client's consent for themselves and their household, via the HMIS consumer notices, to receive services from an HMIS participating Emergency Shelter or Street Outreach project.
2. Tier-2: A signed Coordinated Entry Release of Information form.

TIER 1 – EMERGENCY SHELTER AND STREET OUTREACH ENROLLMENT

The HSC's CE Housing Tier-1 prioritization is an automated process that assesses enrollment data and HMIS history for all clients enrolled in an HMIS participating Emergency Shelter (ES) or Street Outreach (SO) project. Tier-1 also includes

those staying at non-HMIS overnight shelters (including DV shelters), but their process is different, and those providers should contact the CE manager with any questions about policies and procedures.

The Tier-1 report is available to the CE Manager and pulls existing information available in HMIS. The specific details of what pulls into the report are approved by the HSC board of directors and additional information is available on the HSC website.

- **Madison / Dane County CoC Coordinated Entry Questions on the ES and SO enrollment screen**

➤ **Barriers to housing and other vulnerabilities**

There are a few main components to the Tier-1 prioritization and additional details are available on the HSC website. For CE staff and the HMIS CE workflow it is important to remember that the responses to the “Madison / Dane County CoC CE questions” on the SO and ES enrollment screen are scored and included in the report. CE staff should help ensure that this information is as complete, accurate, and current as possible for all clients accessing their ES and SO services. More information on entering this information is available on this [ICA-WI knowledgebase page](#). It is also important that staff adhere to the HSC Written Standards and the ICA HMIS policies for timely data entry to help ensure that our efforts and resources are directed to those currently utilizing our community resources and most in need.

➤ **Determining Household type: Singles vs families**

The composition of the household requesting services will determine how the household gets entered in the Coordinated Entry System. ES and SO program enrollments have two questions that help determine household size and which priority list the household will be referred to. Those two questions are shown below.

Madison / Dane County CoC Coordinated Entry Questions

When you find housing, how many adults, including yourself, will be living together?

1

When you find housing, how many children under age 18 will be living with you, if any? (enter zero if there are no minor children)

0

Based on the household’s answer to these questions they’ll be placed on the Tier-1 priority list for either Households with Children or Households without Children. Both questions are required to be answered. If a household does not have any children, you should enter zero. If the question is left blank the household will not be prioritized until these questions are answered. Below are some examples of both Households with Children and Households without Children.

Household with Children - a household that consists of at least one adult (age 18+) and at least one child (under age 18). The following are some examples of Households with Children:

1. A single parent/guardian with a child or children (under age 18)
 2. A two parent/guardian household with a child or children (under age 18)
 3. A parent/guardian with a child or children (under age 18) that presents with another adult (i.e.: a significant other, extended family member, etc.)
- Important Note – if an adult is presenting for services and their children are not currently with them but plans to reunite with the children when they secure housing they should be accounted for in the “How many children” question above.

Household without Children - a household that consists of at least one adult (age 18+) and no children under the age of 18. The following are some examples of Households without Children:

1. A single adult
2. An adult couple without any children under the age of 18
3. A parent with a child who is 18 years or older

TIER-2: CLIENT ASSESSMENT AND REFERRAL TO THE CE HOUSING QUEUE

• Tier 2 Invitation and Assessment – The VI-SPDAT

The CE Manager identifies individuals to invite for the Tier 2 VI-SPDAT assessment each month. When you are contacted by the CE Manager to complete a Tier 2 Assessment (VI-SPDAT) with a client, that is when you will reach out to your client to complete a VI-SPDAT. *If that client is also chronic then at this time, we would also ask the outreach or shelter staff member working with the client to begin completing chronic documentation with them as well. Single households will complete the VI-SPDAT. Families will complete the VI-F-SPDAT. Youth will complete the VI-Y-SPDAT.

Before completing a VI-SPDAT with a client, please confirm that the request from the CE Manager matches what the client household will look like when in housing. For example, if the CE Manager asks you to complete a Singles VI-SPDAT but the client lets you know their child will be joining them in housing, they should not complete a Singles VI-SPDAT. If this occurs, do not proceed with completing the assessment. It will be necessary to contact the CE Manager with the updated information, and the household prioritization will need to be reconsidered.

- Shelter and outreach staff have 30 days to complete the assessment and should document unsuccessful attempts to contact the client. While the referral remains incomplete, there must be at least one documented attempt to contact during each of the first three weeks since the invitation was made.
- Attempted contacts and any other relevant notes about the Tier 2 Invitation should be documented on the referral to schedule a housing need assessment
- This is done by going into the **History** tab of the client profile and selecting the edit button next to **Referral to Scheduled Coordinated Entry Housing Needs Assessment**.

History

View a history of interactions during this program enrollment

Activity	Start Date	End Date	Type
 Referral to RRH project resource opening:Referral to RRH project resource opening The Salvation Army of Madison This entry added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry	 9/22/26 1 days ago	 9/22/26 1 days ago	CE Event  
 Referral to scheduled Coordinated Entry Housing Needs Assessment:Referral to scheduled Coordinated Entry Housing Needs Assessment The Salvation Army of Madison This entry added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry	 9/7/26 16 days ago	 9/7/26 16 days ago	CE Event  
 WI VI-SPDAT Prescreen for Single Adults [V2] The Salvation Army of Madison This entry added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry	 -	 9/11/25 1 years 12 days ago	Assessm  Edit  Delete

1 - 3 of 3

- Scroll down to the notes portion. You should see the request to complete a VI-SPDAT from the CE Manager. Click on the note where it will open to allow you to edit the note. Please add any relevant information to the Tier 2 Invitation, such as contacts with the client, refusal to complete the VI-SPDAT, etc. Please date and initial the contacts and when you've completed your update select **Save**.

Edit Note

Note for this event

Note

↶ ↷ | **B** *I* | @ | := | ½ :=

9.7.26. Please complete a singles VI-SPDAT and refer to the RRH Queue. -FA

9.9.26. Attempted to reach client but call was sent to voicemail. -FA

9.15. Attempted to reach client, call went unanswered, voicemail was full. Text sent.

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Cancel

Save

➤ Documenting a household that declines to participate

If a household is invited to Tier 2 but doesn't want to complete the assessment or is not currently interested in housing opportunities, this should be documented in the notes as described above as well as completing the “Consent to Participate in Coordinated Entry Assessment” with the client’s answer. Staff have 30 days to complete the assessment with the household and are expected to document at least 3 attempts, 1 per week. At the end of 30 days, staff may contact the CE Manager to request a two-week extension if they believe the household will be assessed within that time. Otherwise, they should notify the CE manager that the household is not interested, so the CE Manager can invite an additional household to replace them.

• Step 1: Find the Shelter or Outreach Program Enrollment

- Once in the client profile, click on the Programs tab and select the relevant Shelter or Outreach Program that you work for.

The screenshot shows the Gloria Time client record interface. On the left is a sidebar with navigation options: Profile, Privacy, Household, Reports, Care Team, Programs (selected), History, and Services. The main content area is titled 'Program enrollments' and shows a table of program enrollment history for Gloria Time. The table has columns for Program Name, Entry Date, Exit Date, and Created by. Two programs are listed: 'Catalyst for Change - Mediation Outreach - City Street Outreach' and 'The Salvation Army of Madison - Single Women's Shelter Emergency Shelter - Night-by-Night'. Both programs show entry and exit dates of 4/6/26 and 7/10/25 respectively, and were created by Francesca Atkinson.

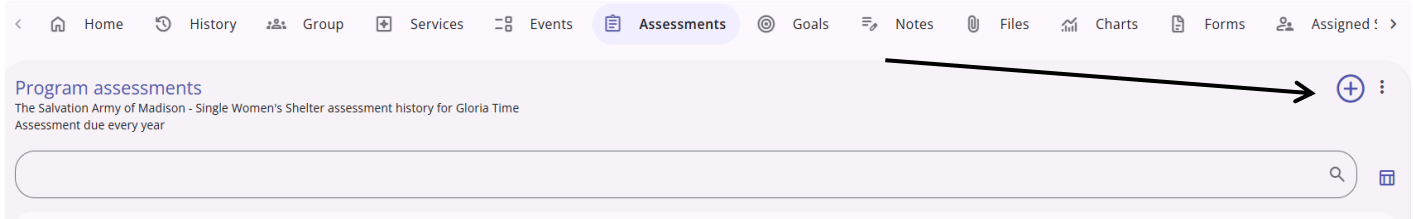
• Step 2: Add Assessment - VI-SPDAT, VI-F-SPDAT, or VI-Y-SPDAT

- Confirm that the VI-SPDAT you’re completing with the household matches **BOTH** the request from the CE Manager and the needs of the household. If the request from the CE Manager does not match the needs of the household, stop and do not complete a VI-SPDAT. Contact the CE Manager.

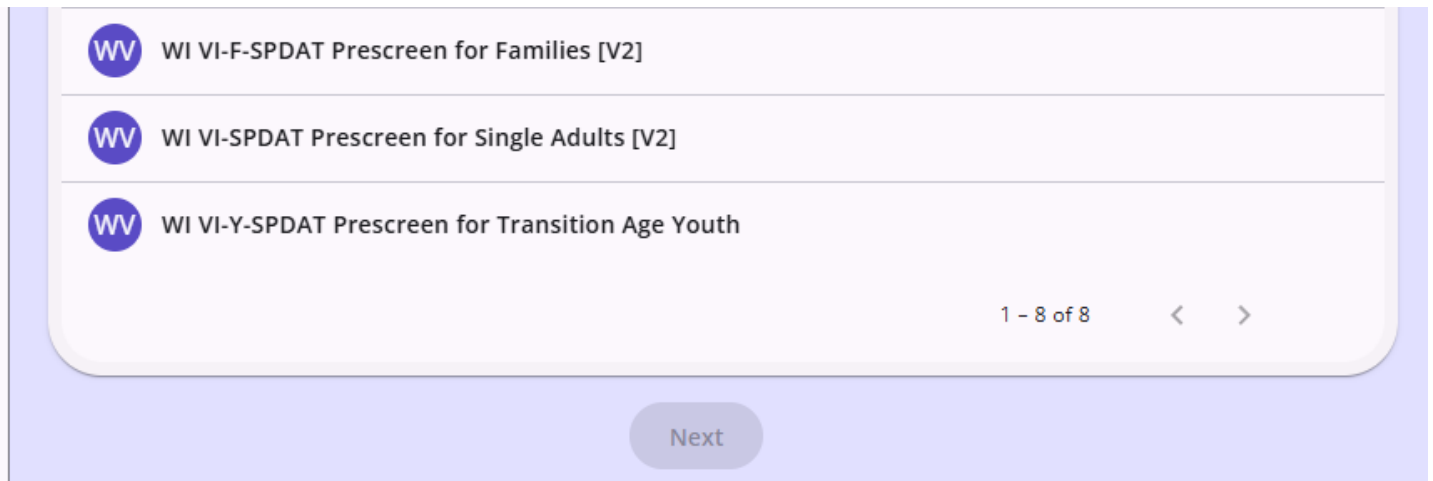
Which priority list is the household being referred to?	Which assessment should be completed?	How should the assessment be completed?
Madison/Dane CE Homeless Prioritization List – Households with Children	WI VI-F-SPDAT for Families	Complete the VI-F-SPDAT for Families under the Head of Household’s enrollment.
Madison/Dane CE Homeless Prioritization List – Households without Children	WI VI-SPDAT for Single Adults OR WI VI-Y-SPDAT for Transition Age Youth	Each household member should be administered their own assessment, within their own individual enrollment.

		Use the VI-SPDAT for Single Adults for household members 25 years or older. Use the VI-Y-SPDAT for Transition Age Youth for household members ages 18 to 24.
--	--	--

- On the **Assessments** tab in the enrollment, click the  icon for the list of available assessments.



- Then select the appropriate assessment and then click **Next**.



- Complete the Coordinated Entry Assessment Questions
 - Assessment Date – *the date the client completed the assessment*
 - Agency Name – *type in the name of your agency*
 - Assessment Location – *select the appropriate option*
 - Assessment Type – *select the appropriate option*
 - Assessment Level – **Housing Needs Assessment**
 - Primary Language – *select the appropriate option*

Program Assessment: WI VI-SPDAT Prescreen for Single Adults [V2]



WI VI-SPDAT Prescreen for Single Adults [V2] data collection for Gloria Time

Assessment Date *

09/22/2026



MM/DD/YYYY

Agency Name

Assessment Location *

Select



Assessment Type *

Select



Assessment Level *

Select



Primary Language



Select



- Complete the remainder of the assessment and click **Save**. This will bring you to the **Program Eligibility Determination** screen.

• Step 3: Refer to the Community Queue

- On the **Program Eligibility Determination** screen, click on the  icon in the community queue referrals section

Assessment Score Summary

VI-SPDAT-V2-C Score Summary

0 - GENERAL
1 - HISTORY OF HOUSING & HOMELESSNESS
3 - RISKS
3 - SOCIALIZATION & DAILY FUNCTION
1 - WELLNESS

8 - VI-SPDAT-V2-C Pre-Screen Total

Community Queue Referrals

View a list of the community queue referrals for the client



No results yet!
Results will be displayed here when they are available.

- the **Madison/Dane PSH and RRH Queue** toggles will appear. The CE Manager will include which queue the client needs to be referred to. Please make sure that you've selected the correct toggle and that only one toggle is selected. Then click **Next**.

Add Community Queue Referral

1 Select Queue(s)

Available Community Queues

Select the queue(s) to refer to

Available Queues

✓ Madison/Dane PSH Queue

Madison/Dane RRH Queue

- On the next screen, select **Save**.

Add Community Queue Referral

1 Select Queue(s)

2 Gloria Time referral

Referral: Add to Community Queue

Referral for Gloria Time

Send to Queue(s)
Madison/Dane PSH Queue

Referring Agency
The Salvation Army of Madison

Referral Date
09/24/2026

Time
9:53 AM

Note

Enter your note here...

Cancel Save Back

- On the next screen, click **complete** to continue.

Add Community Queue Referral

1 Select Queue(s)

2 Gloria Time referral

3 Completed

Nice! You finished this task!
Tap the Complete button below to continue.

✓ Complete

- The Household is now referred to the Community Queue for either PSH or RRH.

• Step 4: Assigning CE Navigator

- After completing the VI-SPDAT and referring the client to the Community Queue, we want to add a Coordinated Entry Navigator. The CE Navigator will be the primary CE Contact and is employed by an agency at which the client is actively enrolled. The navigator can be re-assigned at any point as a client's situation changes but every client must have an assigned navigator.
- To Assign a CE Navigator you will stay in the Community Queue Referral page, click the **pencil** in the right-hand corner to edit, scroll down to Navigator and click on the picklist of possible staff members to assign as a CE Navigator. Scroll down the picklist and select yourself as the Navigator, then hit the **Save** button.

Community Queue Referral
referral for Gloria Time

Pending

Check-In

Referral
Edit referral details

Client
Gloria Time

Referred to
Madison/Dane PSH Queue

Referring Agency
The Salvation Army of Madison

Referred Date
09/22/2026 9:39 AM

Days Pending
2 day(s)

Qualified
Yes

VI-SPDAT-V2-C Score
8

Last Activity
9/24/2026

Staff Home Agency
Madison/Dane CoC Coordinated Entry

Referred by Staff
Francesca Atkinson

Navigator
No value

- Reminder that if the client's situation changes and you're no longer the primary CE Contact, the Navigator should be re-assigned as well.

• Step 5: Add and Review Notes

- Add a note to the Head of Household's Community Queue Referral with any information relevant to their referral.
- Go to the client file and click on the **History** tab. Then click to edit the referral you created for the **Madison/Dane PSH or RRH Queue**.

Activity	Start Date	End Date	Details
Referral: Madison/Dane PSH Queue The Salvation Army of Madison referral to Community Queue This entry added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry	9/22/26, 9:53 AM 2 days ago	Pending	
WI VI-SPDAT Prescreen for Single Adults [V2] The Salvation Army of Madison This entry added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry	-	9/23/26 1 days ago	
Catalyst for Change - Mediation Outreach - City Catalyst for Change This entry added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry	4/6/26 5 months 18 days ago	Active	
Referral to scheduled Coordinated Entry Housing Needs Assessment:Referral to scheduled Coordinated Entry Housing Needs Assessment The Salvation Army of Madison This entry added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry	9/7/26 17 days ago	9/7/26 17 days ago	
The Salvation Army of Madison - Single Women's Shelter The Salvation Army of Madison This entry added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry	7/10/25 1 years 2 months 14 days ago	Active	

1 - 5 of 5

- Scroll down the referral page until you find the **Notes** text box.

Add Note [X]

New Note
Add a note for Referral

Note *

9.24.26 - Client referred to ICA PSH program. Client working with program coordinator to complete next steps. |

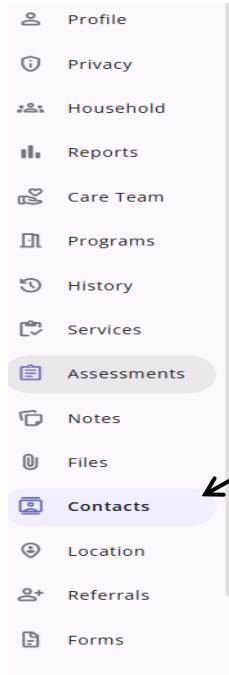
POWERED BY CKEditor

Cancel Save

- Here you can review any previous notes shown up at the top. You can also add your own notes here, after you've typed out the relevant note make sure to click the **Save** button which will save that information in the community queue referral.

- **Step 6: Add Contact Information**

- In the client's file, click on the **Contact** tab on the left side of the page. Then, click the  update contact information



- Add any contact information that is available for the client (emails, phone numbers, etc.). Set the Contact Date for the date the information was collected and be sure to activate the toggle for “Active Contact”. Add notes as needed to clarify any contact information, then click **Save**.
- Note – if the client does not have any means of contact (i.e.: no email, no phone, etc.), add a contact record in the client file with the contact information for the staff member responsible for the referral.

Add Contact

Contact Type *

Client

Email

francesca.atkinson@icalliances.org

Phone (#1)

608-826-8019

Phone (#2)

XXX-XXX-XXXX

☒
Active Contact

Contact Date *

09/24/2026

MM/DD/YYYY

Note

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Client does not have a current phone number or email address. Please contact Francesca at ICA if the client prioritizes for services.

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Cancel

Save

- If the client has an existing Contact record in their file, review the information to determine if it is still current. If it is no longer accurate, simply inactivate the **Active Contact** toggle in the record and click **Save Changes**. Then add a new contact record with the client's current contact information

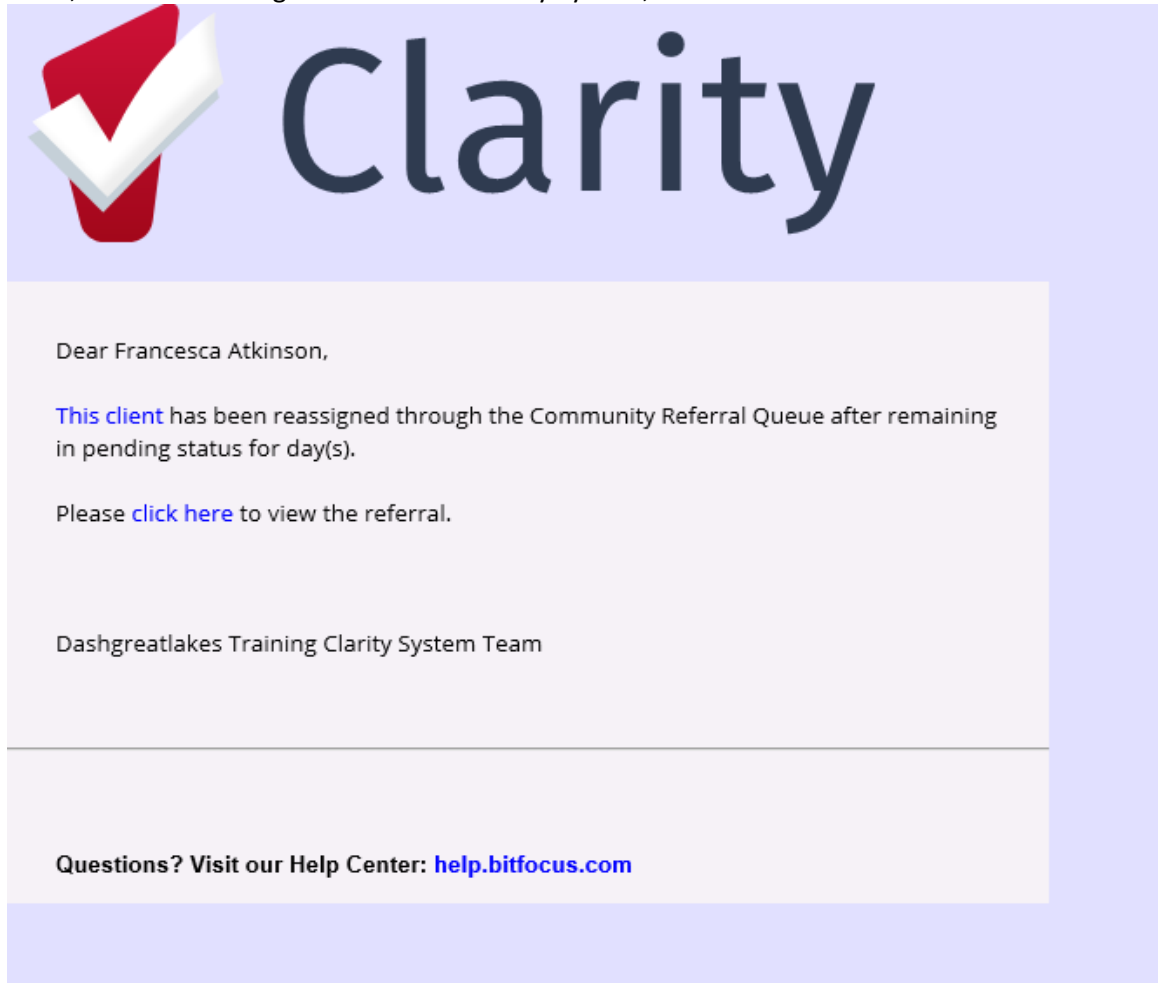
HOUSING PROVIDERS – CLIENT PRIORITIZED FOR HOUSING SERVICES

The Coordinated Entry Manager is responsible for reassigning the referral to a Permanent Housing Program (PSH and RRH) after receiving an email notification from the housing provider of the vacancy. The email serves as documentation of compliance with Coordinated Entry.

When there is an opening in your housing program, send an email to cehousing@icalliances.org. This is a shared inbox amongst Institute for Community Alliances (ICA) staff so if the Coordinated Entry (CE) Manager is out of the office, a colleague can respond to your referral request. You can expect to receive a response within 24 business hours. When requesting a referral, please specify the program you are requesting the referral for (i.e., DAWNS RRH – ESG or DAWNS RRH – Single Women). This information is required to receive a referral in Clarity.

- Accessing a Referral

You will receive an automatic email response from Bitfocus Clarity once a referral has been sent to you. The email will be titled, “Referral Reassign on Wisconsin Clarity System,” and look like this:



To access this referral, follow these steps:

1. From the Client Search page, select **Referrals**.



2. Your screen will change to “**Incoming Referrals**” where you will see names of clients referred to the program.

Referrals
Referrals for Housing Initiatives Inc.

This is the current page

Incoming Referrals
View a list of the incoming referrals for Housing Initiatives Inc.

Referral Status: 2 selected

Client	Program	Referral Date	Days Pending	Referral Status
Gloria Time Referred by The Salvation Army of Madison	Housing Initiatives - PSH Rent Assistance Housing Initiatives Inc.	9/22/26 2 days ago	0 day	Pending 2 days ago

1 - 1 of 1

- Click on the **client's name** to access the referral.
- Document your attempts to reach the client in the **Notes** section of the referral. Please refer to "Step 5: Add and Review Notes" of this guide for additional guidance on how to access the referral notes.

• Denying a Referral

If you are unable to contact the client or the client declines your housing program, you will need to update their referral status.

- From the Client Search Page, select **Referrals**.

Referrals

Search page notification
This is the TRAINING SITE!
Do NOT enter real client data!

Clients
Search for a client

Showing recently accessed clients. Use the search bar above to find other clients.

- Click on the **client's name** to access the referral.

Referrals

Referrals for Housing Initiatives Inc.

Incoming Referrals

Community Queue

Outgoing Referrals

Availability

Open Units

Analysis

Dashboard

Incoming Referrals

View a list of the incoming referrals for Housing Initiatives Inc.

Referral Status: 2 selected

×

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Client	Program	Referral Date	Days Pending	Referral Status
GT Gloria Time Referred by The Salvation Army of Madison	HI Housing Initiatives - PSH Rent Assistance Housing Initiatives Inc.	9/22/26 2 days ago	0 day	Pending 2 days ago

1 - 1 of 1

3. Change their Status to Denied.

09/22/2026

9:53 AM

Days Pending

0 day(s)

In Process

0 day(s)

VI-SPDAT-V2-C Score

8

Qualified

Reassigned

Staff Home Agency

Madison/Dane CoC Coordinated Entry

Referred by Staff

Francesca Atkinson

Pending

Denied

Expired

Pending - In Process

Pending

Hide from customer portal

Cancel

Save

4. Four additional fields will populate: **Denied by Type**, **Denied by Reason** and **Denial Information**. Fill in all fields and click **Save Changes**.

Note: If the client is still experiencing homelessness or you were unable to contact them, they should be returned to the Community Queue. If the client is housed, they should not be returned to the Community Queue and should be exited from Coordinated Entry. If you are denying a referral, there must be notes recorded on the referral that document why you are denying the referral. Please refer to “Step 5: Add and Review Notes” of this guide for additional guidance on how to access the referral notes.

Case Manager

Select

Last Activity
9/24/2026

Denied by Type *

Select

Denied by Reason *

Self Resolved - Client Housed

Current Status *

Denied

Denial Information *

Client secured housing on their own.

Status Date *

09/24/2026 3:42 PM

Cancel Save

- The client will show up in the **Denied** tab. Clarity will notify the CE Manager that this referral has been denied.

Accepting a Referral

If the client accepts your program, you will need to update their referral status by enrolling them into the program.

- Start with the head of household and follow the [housing provider enrollment guidance](#) available on the ICA-WI knowledgebase.
- Locate the program you are enrolling in underneath **Program Referral**.

Client Search > Gloria Time > Referrals

GT Gloria Time
You are currently viewing the Client Record pages for Gloria Time (626F47B6F).

Program Referral

No Contact Information

Referrals
View a list of the referrals for the client

Program	Status	Referred Date	Created by
Housing Initiatives - PSH Rent Assistance Housing Initiatives Inc.	Pending	9/24/26 1 days ago	Francesca Atkinson The Salvation Army of Madison Added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry

Active Referral
Restart the clock for all active referrals
Check-in

Program referrals
View programs that the client is currently referred to
1
Housing Initiatives - PSH Rent Assistance

- Click on  and select the program that you requested the referral for (i.e., if you requested a referral for DAWNS RRH – ESG then you should be enrolling the client in that program). The program

the client was referred to will be highlighted on the right of the program that they were referred to. Click on the highlighted “**Pending Referral**” and click **Next**.

Add program enrollment

1

Select program

Available Programs

Select the program for the enrollment

Name	
▼	HI Housing Initiatives - Britta PSH (CoC, VASH, EHV)
▼	HI Housing Initiatives - Britta PSH (Section 8)
▼	HI Housing Initiatives - Calypso PSH (CoC, VASH, EHV)
▼	HI Housing Initiatives - Dayton PSH (CoC, VASH, EHV)
▼	HI Housing Initiatives - Dayton PSH (Section 8)
▼	HI Housing Initiatives - DHS 1915i
▼	HI Housing Initiatives - Las Casitas PSH (CoC, VASH, EHV)
▼	HI Housing Initiatives - Las Casitas PSH (Section 8)
▼	HI Housing Initiatives - Non-CoC properties
▼	HI Housing Initiatives - PSH Rent Assistance S+C 1

1 - 10 of 13

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Next

- Click on the  and then complete the program enrollment.
- Referrals that were enrolled or denied will show up under the **Program Referral** tab.

Gloria Time
You are currently viewing the Client Record pages for Gloria Time (626F47B6F).

Program Referral

Referrals
View a list of the referrals for the client

Program	Status	Referred Date	Created by
 Housing Initiatives - PSH Rent Assistance Housing Initiatives Inc.	 Completed	 9/24/26 1 days ago	 Francesca Atkinson The Salvation Army of Madison Added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry
 Housing Initiatives - PSH Rent Assistance Housing Initiatives Inc.	 Denied	 9/22/26 3 days ago	 Francesca Atkinson The Salvation Army of Madison Added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry

1 - 2 of 2 < >

➤ Document the Household Moved into a Permanent Housing Unit

At this point, the household has been enrolled in your agency's program and their referral to the Community Queue has been accepted. When client moves into housing you will need to document that on the enrollment screen.

- Go into the Head of Household's file and click on the **Programs** tab. Then click to edit the program enrollment for the Rapid Re-Housing, Permanent Supportive Housing, or Other Permanent Housing program.

Gloria Time
Expand this section to view more details about the client that this program enrollment is for.

Program Referral

Program enrollments
Program enrollment history for Gloria Time

Program Name	Entry Date	Exit Date	Created by
 Housing Initiatives - PSH Rent Assistance PH - Permanent Supportive Housing (disability required for entry) Housing Initiatives Inc.	 9/24/26 Today	 Active	 Francesca Atkinson Housing Initiatives Inc. Added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry
 Catalyst for Change - Mediation Outreach - City Street Outreach Catalyst for Change	 4/6/26 5 months 18 days ago	 4/6/26 5 months 18 days ago	 Francesca Atkinson Catalyst for Change Added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry
 The Salvation Army of Madison - Single Women's Shelter Emergency Shelter - Night-by-Night The Salvation Army of Madison	 7/10/25 1 years 2 months 14 days ago	 7/10/25 1 years 2 months 14 days ago	 Francesca Atkinson The Salvation Army of Madison Added by Francesca Atkinson from primary agency Madison/Dane CoC Coordinated Entry

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- Click on the **pencil**. Enter the date the household moved into their unit in the **Housing Move-In Date** field. Scroll to the bottom of the screen and click **Save**.

NOTE: The housing move in date is the night the household began sleeping in the unit. Please coordinate with any TH or emergency shelter providers to ensure there is no overlap in the enrollments.

Edit Client Program
Update client program for Gloria Time in Housing Initiatives - PSH Rent Assistance

Project Start Date *

09/24/2026

MM/DD/YYYY

Translation Assistance Needed

Translation Assistance Needed *

No

Sex *

Female

In which county is the client being housed or service being provided? *

Dane

Complete Housing Move-In Date When Client Moves Into a Permanent Housing Unit

Housing Move-In Date

09/24/2026

➤ Document the Household did NOT Move into a Permanent Housing Unit

There are times when a household will not successfully secure their own Permanent Housing. When a household does not secure housing within the allotted timeframe, the program will need to document that the client exited the program without securing housing.

➤ EXIT THE HOUSEHOLD FROM THE PROGRAM ENROLLMENT

- In this situation, please follow the housing provider guidance for [exiting a client from a program enrollment](#) on the ICA knowledgebase.

➤ ADD THE HOUSEHOLD BACK TO THE COMMUNITY QUEUE

- If the household remains literally homeless and is or will be (re)connected to a street outreach agency or emergency shelter they should immediately be referred back to the appropriate community queue. In this situation the housing provider must notify the CE manager via the cehousing@icalliances.org email so that they may coordinate with the responsible person at the relevant shelter or outreach program.
- The shelter or outreach project should create a new referral. They should use the most recent assessment unless the household has experienced major life changes. A major life change includes, but is not limited to, the following: change in household composition, pregnancy, change in health status, and additional interaction with emergency services. If a household has experienced major life changes, a new assessment should be completed.
- Both approaches will follow the same workflow outlined in Step 5 of this document. Please add a note to the new referral explaining why the household is being referred to the queue again.

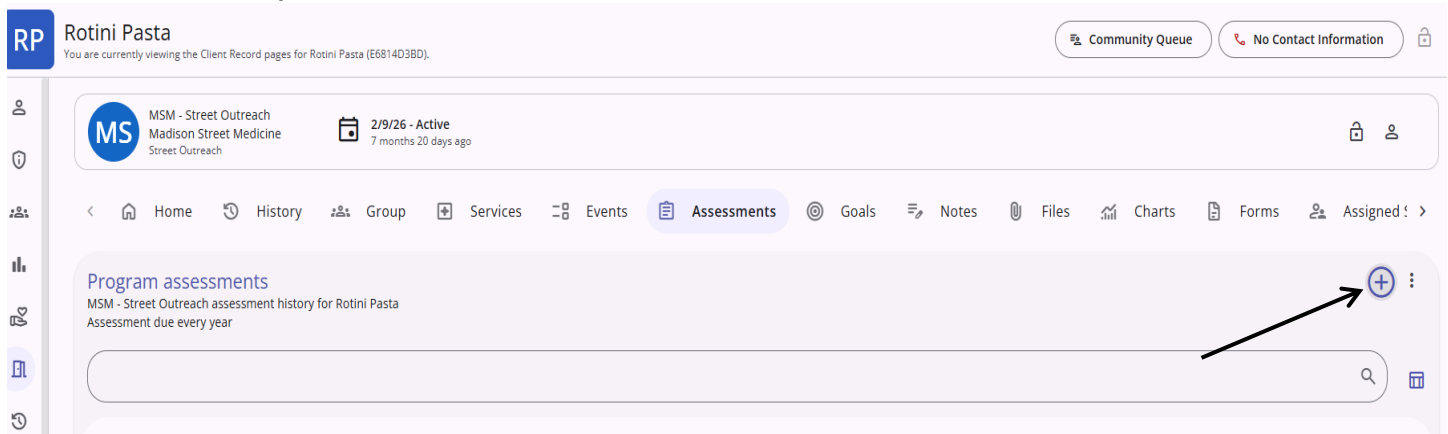
- Other reasons for removal from the Queue- A household self-resolves or enters an institution

- CE staff should follow the HSC written standards for when to exit a household from an emergency shelter or street outreach project. In most cases, no further work is required for the CE referral and the referral will automatically close after a period of inactivity.

ADDITIONAL INFORMATION

- Status Update Assessment

- The **Status Update Assessment** is intended to be used at *any time* throughout a program enrollment when a change in status has occurred.
- Status updates ensure that correct information is reflected on the coordinated entry priority list and helps determine eligibility for prioritization for some housing programs.
- Adding a Status Update Assessment:
- Once you are in the Head of Household's Program Enrollment, click on the Assessments Tab. Then Click  to add a **Status Update Assessment**.



RP Rotini Pasta
You are currently viewing the Client Record pages for Rotini Pasta (E6814D3BD).

Community Queue No Contact Information

MSM - Street Outreach
Madison Street Medicine
Street Outreach

2/9/26 - Active
7 months 20 days ago

Home History Group Services Events Assessments Goals Notes Files Charts Forms Assigned ! >

Program assessments
MSM - Street Outreach assessment history for Rotini Pasta
Assessment due every year

+

Next, select **Status Update Assessment** and click **Next**.

Add a program assessment



1 Select an assessment

Available Assessments

Select an assessment to add to MSM - Street Outreach

Name



Current Living Situation



Status Update Assessment



Annual Assessment



Coordinated Entry Homelessness Documentation



Dane CE Tier-2 Alternative Assessment - ICA CE Staff Only



Men's Shelter Referral and Street Outreach Assessment



WI VI-F-SPDAT Prescreen for Families [V2]



WI VI-SPDAT Prescreen for Single Adults [V2]



WI VI-Y-SPDAT Prescreen for Transition Age Youth

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Next

Make sure to include other household members when completing a Status Update. Select the household members to include and click **Next**.

- Update the information on the Program Assessment: Status Update Assessments to best reflect the client’s current situation and chronicity status. Then click **Save** to complete the Status Update Assessment for additional household members or click **Save & Complete** if your household consists of only one person.
 - Note: There are no files to update on the Status Update Assessment for children under the age of 18. You will just need to make sure the Project Status Date is correct for the child, and then click **Save & Complete**.

• How to Upload Coordinated Entry related documents to the program enrollment.

The following documents need to be uploaded for each referral to a Coordinated Entry housing queue:

1. Coordinated Entry Release of Information
2. If Applicable, Chronic Homelessness Documentation

*If Chronic Homelessness Documentation is uploaded, please notify the CE Manager.

3. Within the shelter or Street Outreach Program Enrollment, click on the **Files** tab.
4. Once in the files tab, click on the  icon.

5. Select the appropriate **Category** and **Name** for the file you are uploading, and then select the file from your computer to upload. Once the file is uploaded, click **Save**.

Add File

New File

Add a file for Gloria Time

Category *

1. HMIS Release of Information

Predefined Name *

HMIS ROI

File *

Drag and drop a file here

or

Choose A File

Accepted formats: JPEG, JPG, GIF, PNG, TIFF, HEIC, TXT, DOC, DOCX, PDF, XLSX, ZIP · Max size: 25Mb

Cancel

Save

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