

Racine City and County CoC Coordinated Entry HMIS Guide

Institute for Community Alliances

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INTRODUCTION

This guide is intended to compliment the Racine City and County CoC Coordinated Entry Policies and Procedures. It is the companion document for clients who will be entered into the Coordinated Entry System via HMIS. Additional information about the Racine City and County CoC Coordinated Entry Process can be found here:

<https://racinecoc.org/>

COORDINATED ENTRY DATA ENTRY FOR ALL USERS

Anyone with an HMIS user license can add an individual or household to the priority lists. Any client contacting a Coordinated Entry participating agency requesting housing or shelter related services is required to be offered access to Coordinated Entry. The client may choose to have their data entered into HMIS to be referred to the Coordinated Entry lists utilizing HMIS.

Requirements for Coordinated Entry in HMIS:

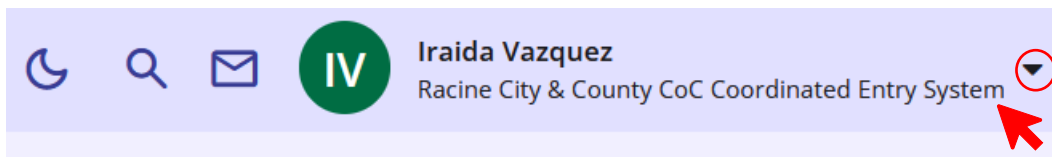
1. The client's consent for themselves and/or their household to participate in Coordinated Entry.
2. A completed Coordinated Entry Prescreen form.
3. A signed HMIS Release of Information form for those being added to the HMIS Priority List.

ADDING AN INDIVIDUAL OR HOUSEHOLD TO THE COORDINATED ENTRY SYSTEM

Getting Started

- Log into Clarity Human Services.
- To complete Coordinated Entry-related data entry, you will need to switch into the "Racine City and County CoC Coordinated Entry System" agency.

In the upper right corner of your screen, you will see your name and your primary agency listed below. Click on the arrow to the right of your primary agency and click on "Racine City and County CoC Coordinated Entry System" from the dropdown to switch into the agency.



- Be sure to switch into the "Racine City and County CoC Coordinated Entry System" agency whenever you are doing Coordinated Entry data entry (enrollments, updates, program exits, etc.)

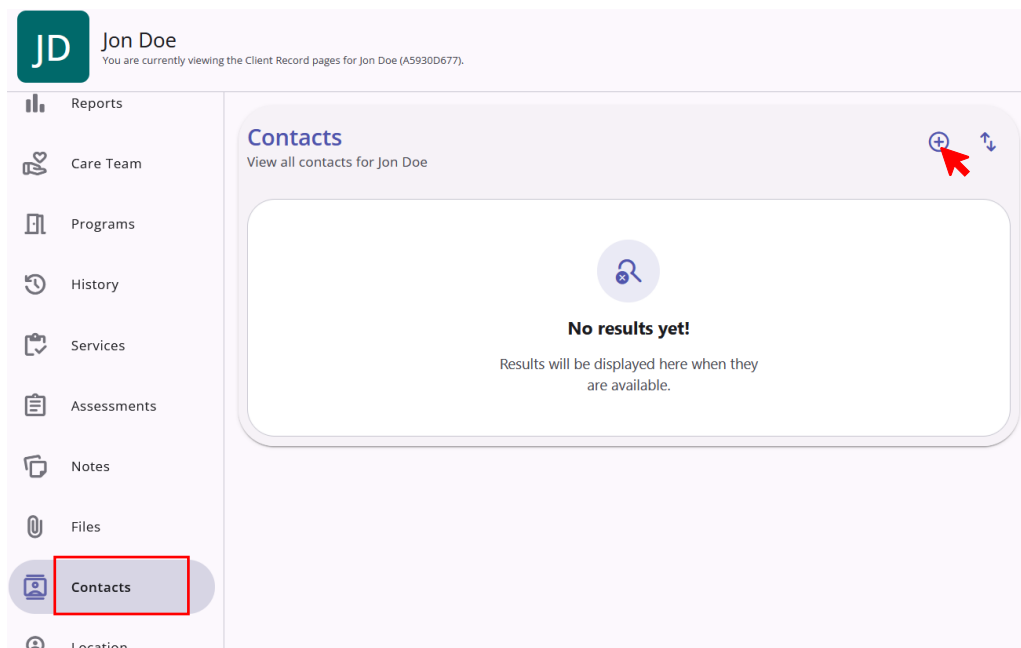
NOTE: Only users who have completed all Racine City and County CoC Coordinated Entry training requirements can have access to the Racine City and County CoC Coordinated Entry System agency in Clarity Human Services.

Search for Client(s) in the Household

- Use the [Client Search](#) bar to see if the client(s) being referred to the Coordinated Entry System have an existing file in Clarity Human Services.
 - Confirm the accuracy of existing files in the system or [create new files](#) for any clients that do not already have a file.
- If there is more than one person in the household, make sure all household members (any adults and children that are included on the Prescreen Form) are [grouped together as a household on the client profiles](#).

Add Client Contact Information

- Go to the Head of Household's file and navigate to the **Contact** tab by scrolling down the left side column. Click **Add Contact** if there is no contact information documented in the file.



- Fill in all contact information available for the client. If multiple phone numbers are documented, you may use the Note box to provide details for both numbers listed. Once complete click **Save**.

Add Contact

Add Contact

Add a new contact for Jon Doe

Contact Type *

Client

Email

jondoe@gmail.com

Phone (#1)

262-221-5204

Phone (#2)

262-633-3235

☒ Active Contact

Contact Date *

09/15/2026

MM/DD/YYYY

Note

Enter a note...

Cancel Save

If there is existing contact information in the file that is no longer accurate, **DO NOT DELETE** the outdated information. Instead, click on the row of the existing Contact information.

Contacts

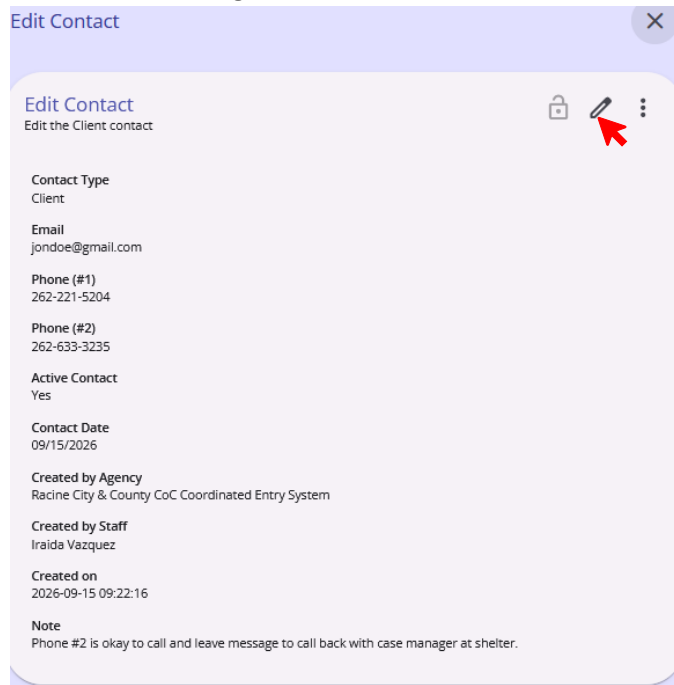
View all contacts for Jon Doe

Contact Type	Name	Phone	Email	Date
Client Added by Iraida Vazquez Racine City & County CoC Coordinated Entry System	Jon Doe	262-221-5204	jondoe@gmail.com	9/15/26

1 - 1 of 1

< >

- Click on the **edit icon** button to edit the existing contact information.



Edit Contact
Edit the Client contact

☐  

Contact Type
Client

Email
jondoe@gmail.com

Phone (#1)
262-221-5204

Phone (#2)
262-633-3235

Active Contact
Yes

Contact Date
09/15/2026

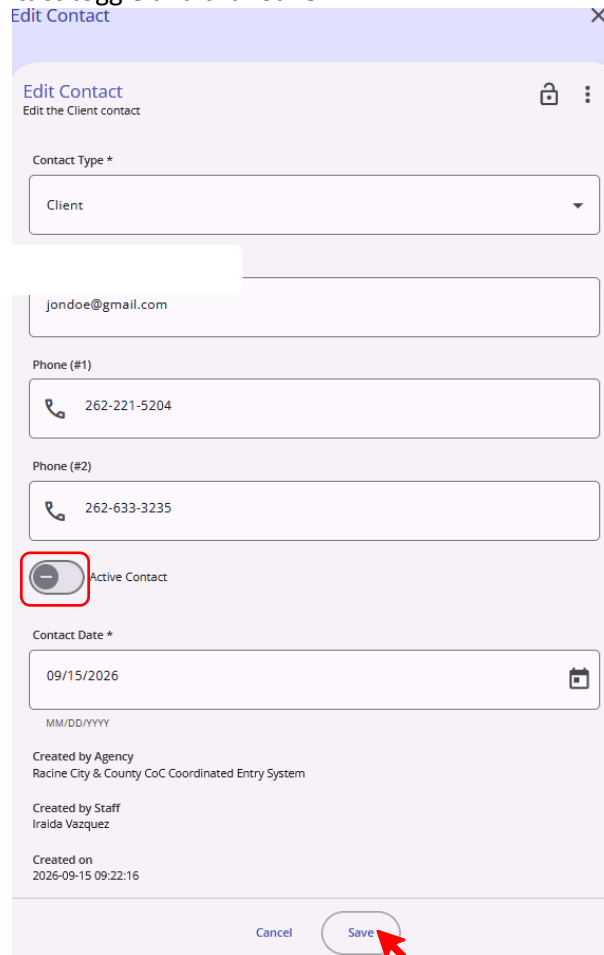
Created by Agency
Racine City & County CoC Coordinated Entry System

Created by Staff
Iraida Vazquez

Created on
2026-09-15 09:22:16

Note
Phone #2 is okay to call and leave message to call back with case manager at shelter.

- Then deactivate the **Active Contact** toggle and click **Save**.



Edit Contact
Edit the Client contact

☐ 

Contact Type *
Client

Email
jondoe@gmail.com

Phone (#1)
262-221-5204

Phone (#2)
262-633-3235

☒ **Active Contact**

Contact Date *
09/15/2026

MM/DD/YYYY

Created by Agency
Racine City & County CoC Coordinated Entry System

Created by Staff
Iraida Vazquez

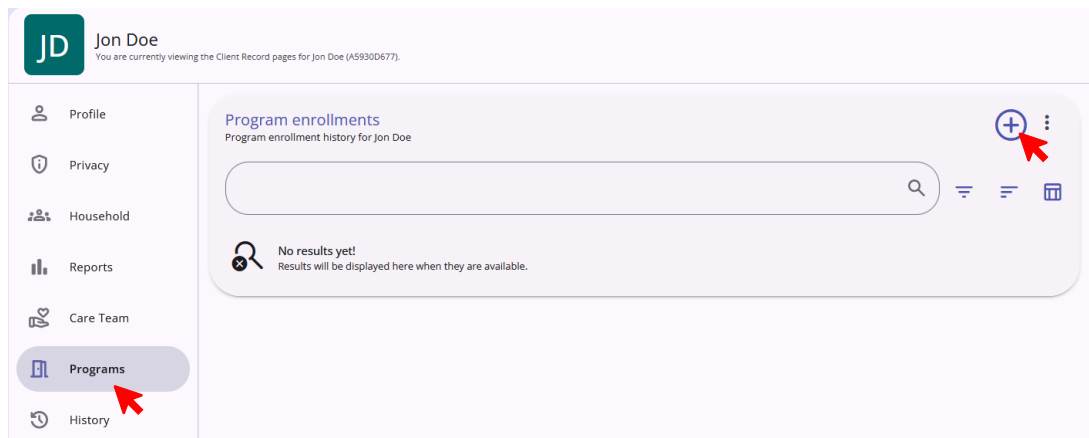
Created on
2026-09-15 09:22:16

Cancel **Save**

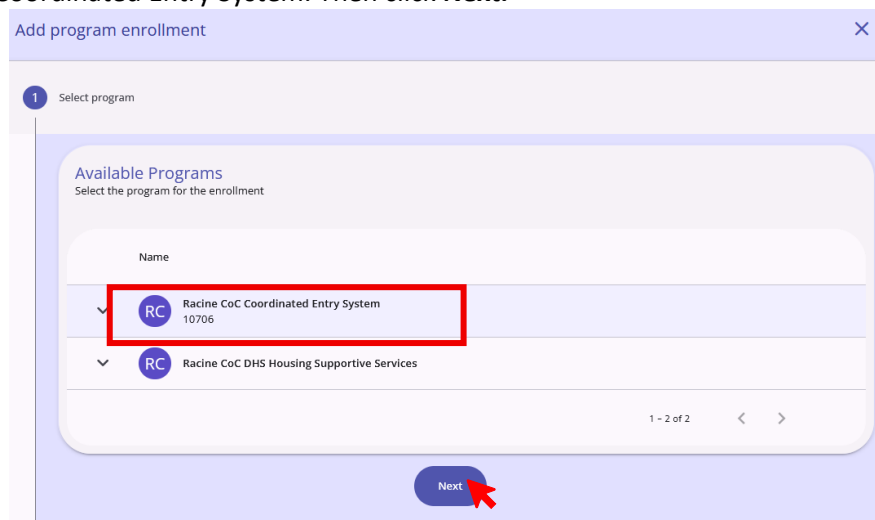
- This will deactivate the old contact information but save it in the historical record. Then add a new contact record.

Create the Program Enrollment

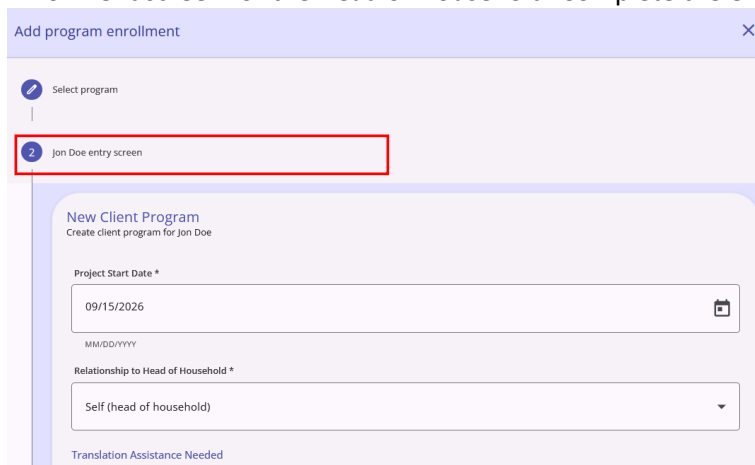
- Go to the Head of Household's file and navigate to the Programs tab. Then click the  button to select the program to add the client into within the "Racine City and County CoC Coordinated Entry System" agency under the Available Programs section.



- Select Racine CoC Coordinated Entry System. Then click **Next**.



- This will take you to the Enrollment screen for the Head of Household. Complete the entry screen



- The Enrollment screens for the Head of Household member will auto-populate.

Enrollment Screen for Head of Household

- Project Start Date – *enter the date the household completed the CE assessment*
- Relationship to Head of Household – *will only need to fill this in if the household contains more than 1 person*
- Translation Assistance Needed – Select “Yes” or “No.” If yes, the following question will appear:
 - Preferred Language – Select the client’s preferred language. If “Different Preferred Language” is selected, the following question will appear:
 - IF Different Preferred Language, please specify

INTERVIEWER’S INFORMATION

- Interviewer’s Name – *enter the name of the staff member completing the interview*
- Contact Information for Person Responsible for Referral – *email and/or phone number*
- Racine Agency Name – *select the interviewer’s agency of employment*
- In which county is the client being housed or service being provided – *select Racine*

LIVING SITUATION AT TIME OF ASSESSMENT

- Type of Residence – *where is the client/household currently sleeping?*
- Length of Stay in Prior Living Situation – *how long has the client/household been sleeping in the above-noted location?*
- Approximate Date Homelessness Started – *the date the client’s most recent episode of literal homelessness began. This is often (not always) different than the date the client’s overall literal homelessness began.*
- Number of times on the streets, in ES, or SH in the past three years – *“Times” = episodes.*
- Total number of months homeless on the streets, in ES, or Safe Haven in the past three years:
 - If more than 12 months homeless on the street, in emergency shelter, or safe haven, enter the total number of months in the past 3 years

DISABLING CONDITIONS AND BARRIERS

- Disabling Condition – *select Yes or No.*
- Survivor of Domestic Violence – *select Yes or No. If yes, the following questions will appear for you to answer:*
 - When experience occurred
 - Are you currently fleeing
- Formerly a Ward of Child Welfare or Foster Care Agency – *select Yes or No.*

HOUSING-SPECIFIC NEEDS

- Special Housing Considerations – *note any housing needs the household has (ex: household requires a wheelchair accessible unit)*

- Once you have completed all fields on the screen, you will have the option to click **Save**.

Record a Current Living Situation Assessment

- The workflow will automatically take you to complete the Current Living Situation assessment.

The screenshot shows a form titled "Record Current Living Situation" with a sub-header "Current Living Situation is required for this program at each client contact. Complete the initial assessment below." The form contains the following fields:

- Date of Contact ***: A date picker showing "09/15/2026".
- Current Living Situation ***: A dropdown menu with the selected option "Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Host Home shelter".
- Living Situation Verified By**: A dropdown menu with the selected option "HALO Inc Women and Families Shelter".
- Location Details**: A text input field.

A red box highlights the "Record Current Living Situation" header, and a red arrow points to the "Save" button at the bottom right.

- Complete the Current Living Situation for the Head of Household
 - Date of Contact – *this should match the Enrollment date / should be the same date the client completed the Coordinated Entry Assessment.*
 - Current Living Situation – *where is the client / household currently sleeping? This should match what was reported on the Enrollment screen.*
 - Living Situation Verified By – *select from the dropdown your agency's program that is completing the assessment*
 - Location Details – *you may type in any notes related to the client's location; this is optional.*
- Step 4: Include household members will populate next. Select other household members to include in the enrollment and click **Next**.

The screenshot shows a form titled "Include household members (optional)" with a sub-header "Select members (optional)" and the instruction "You can select other household members below to add to the enrollment or just leave this empty and save to continue." The form contains a section titled "Household Members" with a list of names and checkboxes:

- Jon Doe
- ☒ Sally Doe

A red box highlights the checkbox for Sally Doe, and a red arrow points to the "Next" button at the bottom right.

- **Enrollment Screen for Additional Adults in the Household**

- Project Start Date
- Relationship to Head of Household

LIVING SITUATION AT TIME OF ASSESSMENT

- Type of Residence
- Length of Stay in Prior Living Situation
- Approximate Date Homelessness Started
- Number of times on the streets, in ES, or SH in the past three years
- Total number of months homeless on the streets, in ES, or Safe Haven in the past three years:
- If more than 12 months homeless on the street, in emergency shelter, or safe haven, enter the total number of months in the past 3 years

- **DISABLING CONDITIONS AND BARRIERS**

- Disabling Condition

Enrollment Screen for Children in the Household

- Project Start Date
- Relationship to Head of Household
- In which county is the client being housed or being served? This should be Racine for all clients.

DISABLING CONDITIONS AND BARRIERS

- Disabling Condition

- Once you have finished entering the Enrollment information for each household member, you will click **Save**.

Sally Doe entry screen

New Client Program
Create client program for Sally Doe

Project Start Date *

09/15/2026

MM/DD/YYYY

Relationship to Head of Household *

Head of household's child

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

Racine

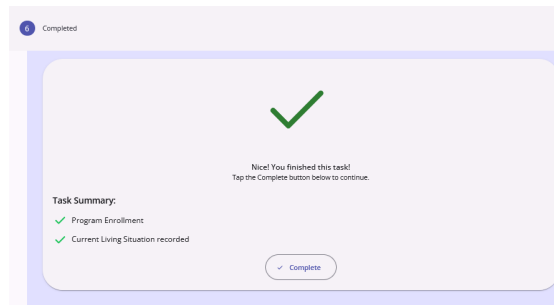
Disabling Conditions and Barriers

Disabling Condition *

No

Cancel Save

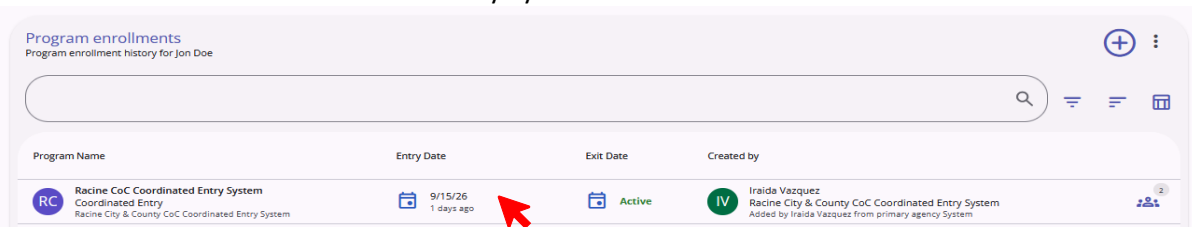
- Nice job! The Enrollment and Current Living Situation Assessment has been created for the household. Click **Complete**.



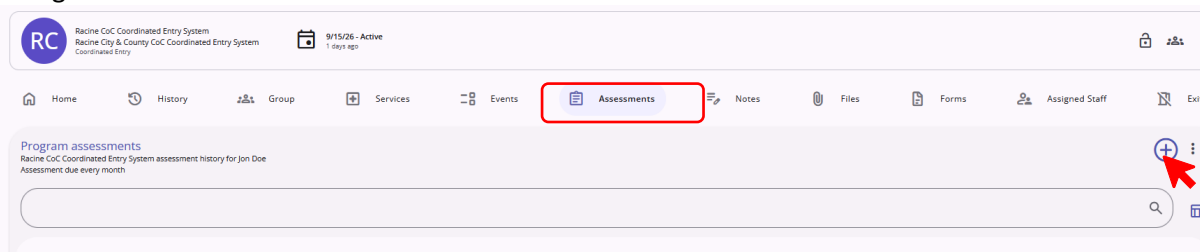
- You will automatically land on the “Program enrollments” tab within the client file.

Record the Consent to Participate in Coordinated Entry

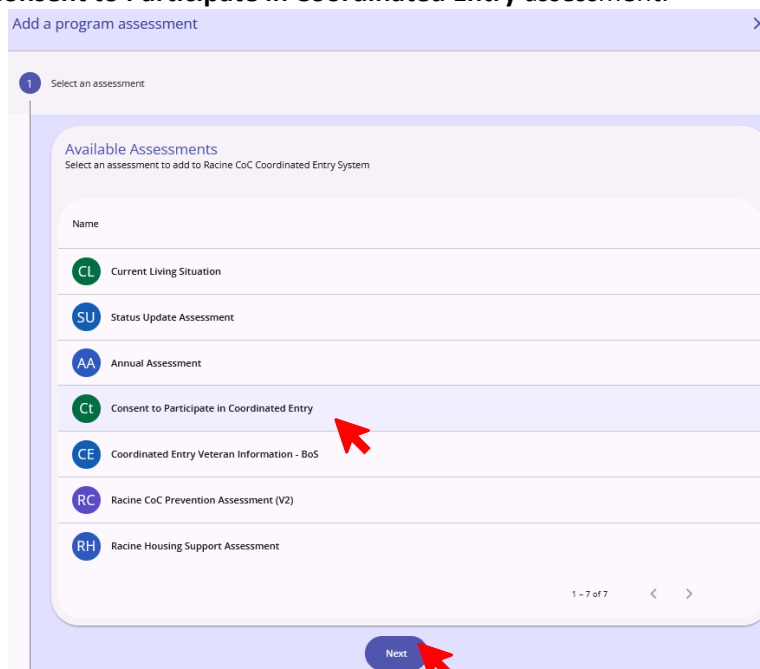
- Click on the Racine CoC Coordinated Entry System enrollment to record a Consent Assessment.



- Navigate to the **Assessments** tab within the Enrollment.



- Click  to add a **Consent to Participate in Coordinated Entry** assessment.



- Select **Consent to Participate in Coordinated Entry** and click **Next**. Complete the assessment questions.

2 Jon Doe assessment

Program Assessment: Consent to Participate in Coordinated Entry
Consent to Participate in Coordinated Entry data collection for Jon Doe

Assessment Date *

09/15/2026

MM/DD/YYYY

Does the client consent to participate in Coordinated Entry?

Yes

Cancel Save

- Assessment Date – *this should match the date of the enrollment / the date the client completed the Coordinated Entry Assessment*
- Does the client consent to participate in Coordinated Entry? – *select “Yes”*
- Click **Save** and **Complete**

3 Completed

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

✓ Complete

If a client declines to participate in Coordinated Entry, this can be documented without creating an enrollment. See [Documenting Clients That Decline to Participate in Coordinated Entry](#) for instructions.

Complete the Racine Housing Support Assessment

- While you are still on the Assessments tab, select the **Racine Housing Support** assessment to complete with the head of household.

1 Select an assessment

Available Assessments
Select an assessment to add to Racine CoC Coordinated Entry System

Name

- CL Current Living Situation
- SU Status Update Assessment
- AA Annual Assessment
- Cl Consent to Participate in Coordinated Entry
- CE Coordinated Entry Veteran Information - BoS
- RC Racine CoC Prevention Assessment (VZ)
- RH Racine Housing Support Assessment

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Next

- Click **Next** to begin the assessment.
 - Complete the Coordinated Entry Assessment questions
 - Assessment Date – *this should be the date the client completed the assessment.*
 - Agency Name – *type in the name of the agency that completed the CE assessment.*
 - Assessment Location – *select the appropriate option.*
 - Assessment Type – *select the appropriate option.*
 - Assessment Level – **Housing Needs Assessment**
 - Primary Language – *select the appropriate response.*

Add a program assessment

Select an assessment

2 Jon Doe assessment

Program Assessment: Racine Housing Support Assessment
Racine Housing Support Assessment data collection for Jon Doe

Assessment Date *

09/15/2026

MM/DD/YYYY

Assessment Location *

Case manager office

Assessment Type *

In person

Assessment Level *

Housing Needs Assessment

HOMELESS ASSESSMENT

- Scroll down and complete the Homeless Assessment and Barriers Assessment section, please note, some fields carried over responses from the enrollment screen. Make sure the responses for those fields are accurate according to the date of the assessment.

HOMELESS ASSESSMENT

Living Situation at Time of Assessment *



Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Host Home shelter ▼

Survivor of Domestic Violence



No ▼

Do you or anyone in your household have any disabling condition? If yes, how many of the following apply? (Mental Health Disorder, Physical Disability, Developmental Disability, Chronic Health Condition, HIV/AIDS, Substance Use Disorder) *



2 ▼

Do you or anyone in your household have non-chronic medical needs? *

No ▼

Are there any children under the age of four in your household? *

Yes ▼

Families with five or more individuals *

No ▼

BARRIERS ASSESSMENT

Have you or anyone in your household been impacted by or discriminated against due to racial or ethnic bias? *

No

Have you or anyone in your household been impacted by or discriminated against due to gender identity or sexual orientation? *

Yes

How many times have you or anyone in your household been arrested, cited, or been in jail/prison/juvenile detention? *

0 times

Do you or anyone in your household have any past or current financial legal issues that are being resolved in court that may affect or limit your ability to obtain or maintain housing? *

Yes

Do you or anyone in your household have any past or current family legal issues that are being resolved in court that may affect or limit your ability to obtain or maintain housing? *

No

Has your household had a consistent source of income for at least 6 months? *

No

NOTE CE STAFF: Inform the prospective client that the next questions ask about recent or past trauma. Ask the client if it is okay to proceed. If the client does not want to be asked the question, enter client prefers not to answer.

How many times have you or anyone in your household been the victim of a crime in the past year? *

0 times

Have you or anyone in your household experienced any form of domestic, sexual violence, and/or trafficking in the past year? *

No

Cancel Save

Back

- Once completed, click **Save**. This will bring you to the “Referral: Add to Community Queue” Screen.

Make the Referral to the Community Queue

Next, Make sure the date of the referral is accurate and click **Save**.

Jon Doe referral

Referral: Add to Community Queue

Referral for Jon Doe

Send to Queue(s)
Racine Firm Housing Queue

Referring Agency
Racine City & County CoC Coordinated Entry System

Referral Date

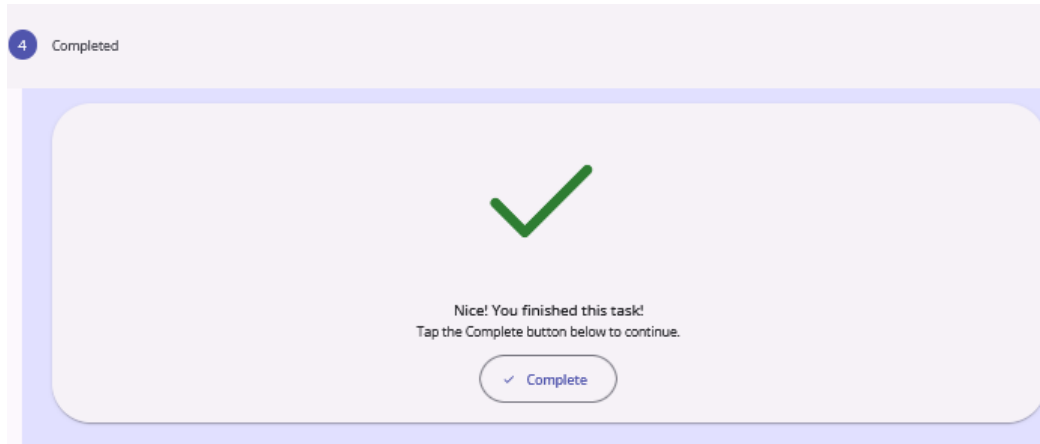
09/15/2026 12:32 PM

Note

Enter your note here...

Cancel Save

- Nice Job! The Assessment and referral to the Community Queue is now complete. Click **Complete**

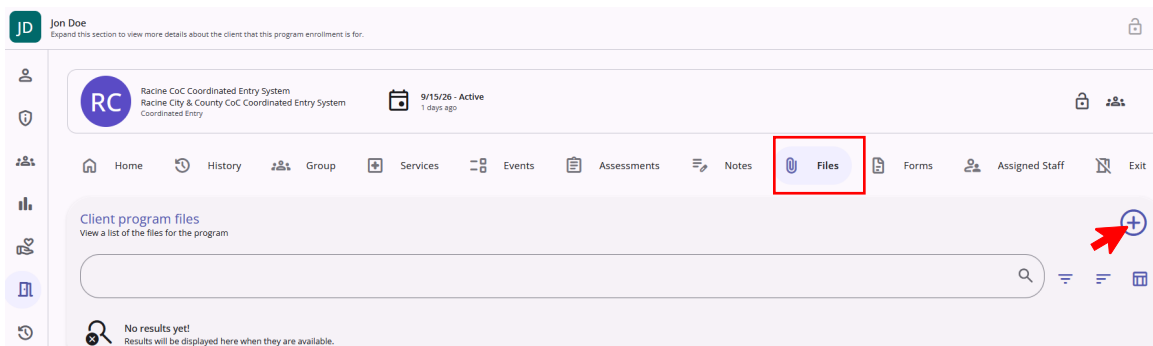


Upload Scanned Coordinated Entry Documents into the Enrollment

The following documents are optional to be uploaded for each Coordinated Entry Program Enrollment:

1. HMIS Release of Information
2. Racine CES Client Consent for Case Staffing
3. Client Prescreen and Rights & Responsibilities Form

- Within the Program Enrollment, click on the **Files** tab. Click  to add a **Files**



Add File

New File

Add a file for Jon Doe

Category *

2. Coordinated Entry

Predefined Name *

All CE paperwork

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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- Select the appropriate **Category** and **Predefined Name** for the file you are uploading, and then select the file from your computer to upload. Click **Save**.

New File
Add a file for Jon Doe

Category *

2. Coordinated Entry

Predefined Name *

All CE paperwork

File *

Client Rights and Responsibilities 2023.pdf
118.5 KB
Last modified on null

Cancel Save

- You will then see the file you uploaded in the Client Program Files.

File	Uploaded Date	File Name	File Size	Preview
2. Coordinated Entry All CE paperwork Racine City & County CoC Coordinated Entry System	9/15/26 Today	ClientRightsandResponsibilities2023.pdf	118.5 KB	

1 - 1 of 1

FOR VETERAN SERVICE PROVIDERS: “COORDINATED ENTRY VETERAN INFORMATION” ASSESSMENT

On the **Assessments** tab there is an assessment called “Coordinated Entry Veteran Information”. This assessment is to be used by Veteran Service Providers when reviewing Veteran referrals to the Coordinated Entry System.

To add an assessment, complete the following steps:

- On the **Assessments** tab within the Coordinated Entry Program Enrollment, click to add a “Coordinated Entry Veteran Information-BOS” assessment. Select “Coordinated Entry Veteran Information – BOS” from the list of assessments and click **Next**

Add a program assessment

1 Select an assessment

Available Assessments
Select an assessment to add to Racine CoC Coordinated Entry System

Name

Consent to Participate in Coordinated Entry
Coordinated Entry Veteran Information - BoS
 Racine CoC Prevention Assessment (V2)
 Racine Housing Support Assessment

1 - 4 of 4

Next

- Complete the assessment questions and then click **Save and Complete**.

Program Assessment: Coordinated Entry Veteran Information - BoS
Coordinated Entry Veteran Information - BoS data collection for Humpty Dumpty

Assessment Date *

09/22/2026

MM/DD/YYYY

Assessment date can be updated each time the client is reassessed

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

Racine

Is Veteran eligible for VA medical services?

No

Is Veteran eligible for VASH?

No, other reason

Is Veteran eligible for SSVF services?

No, over income

TRACKING YOUR COORDINATED ENTRY ENROLLMENTS / REFERRALS

- When you created the Enrollment into the “Racine CoC Coordinated Entry System” program, you are automatically listed as the “Assigned Staff” in the Program Enrollment.

RC Racine CoC Coordinated Entry System
Racine City & County CoC Coordinated Entry System
Coordinated Entry

9/15/26 - Active
6 days ago

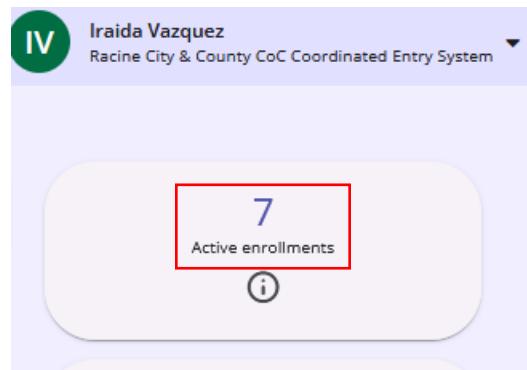
Home History Group Services Events Assessments Notes Files Forms **Assigned Staff** Exit

Assigned Staff
Staff members assigned to this program enrollment

Name
IV Iraida Vazquez

1 - 1 of 1

- The client / household is automatically added to your **Active Enrollments** tab when you are listed as the Assigned Staff.



- When you click on the **Active Enrollments** tab, this will show you all the active enrollments for which you are listed as the Assigned Staff. This provides an easy way to track your active Coordinated Entry enrollments and referrals as well as all other program enrollments you are listed as Assigned Staff.

Active enrollments
Active client enrollments you have created or were assigned to

Client	Program Name	Start Date	Created by
Dumpty, Humpty 0E7203B59	HALO APOMO PSH PH – Permanent Supportive Housing (disability required for entry) HALO, Inc.	8/5/26 1 months 16 days ago	Iraida Vazquez HALO, Inc. Added by Iraida Vazquez from primary agency System
Doe, Jon 21BA44656	HALO Inc Women and Families Shelter Emergency Shelter – Entry Exit HALO, Inc.	7/15/26 2 months 6 days ago	Iraida Vazquez HALO, Inc. Added by Iraida Vazquez from primary agency System
Corral, Golden A8456D539	Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System	8/3/26 1 months 18 days ago	Iraida Vazquez Racine City & County CoC Coordinated Entry System Added by Iraida Vazquez from primary agency System
Dodge, Kathleen 3A1E6457	Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System	9/8/26 13 days ago	Iraida Vazquez Racine City & County CoC Coordinated Entry System Added by Iraida Vazquez from primary agency System
Doe, Jon 21BA44656	Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System	9/15/26 6 days ago	Iraida Vazquez Racine City & County CoC Coordinated Entry System Added by Iraida Vazquez from primary agency System
Test, Testing 581093107	Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System	5/28/26 3 months 24 days ago	Iraida Vazquez Racine City & County CoC Coordinated Entry System Added by Iraida Vazquez from primary agency System
Gaga, Lady 44C0C78E8	Veterans Path to Hope - Day Center Day Shelter Veterans Path to Hope	9/18/26 3 days ago	Iraida Vazquez Veterans Path to Hope Added by Iraida Vazquez from primary agency System

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- The **Status Due** tab will provide information on households' enrollment start dates and the last date on which an annual assessment was completed.
 - This tab can assist in tracking when clients are due for a 30 day update to their Coordinated Entry Referral and Enrollment if you use the **Annual Assessment** instead of Status Update Assessment.

Status due Enrollments in your caseload for which annual assessments are required			
Client	Program Name	Start Date	Assessment Due
✓ Test, Testing 581093107	Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System	5/28/26 3 months 26 days ago	8/28/26 26 days ago
1 - 1 of 1			

COMPLETING COORDINATED ENTRY UPDATES

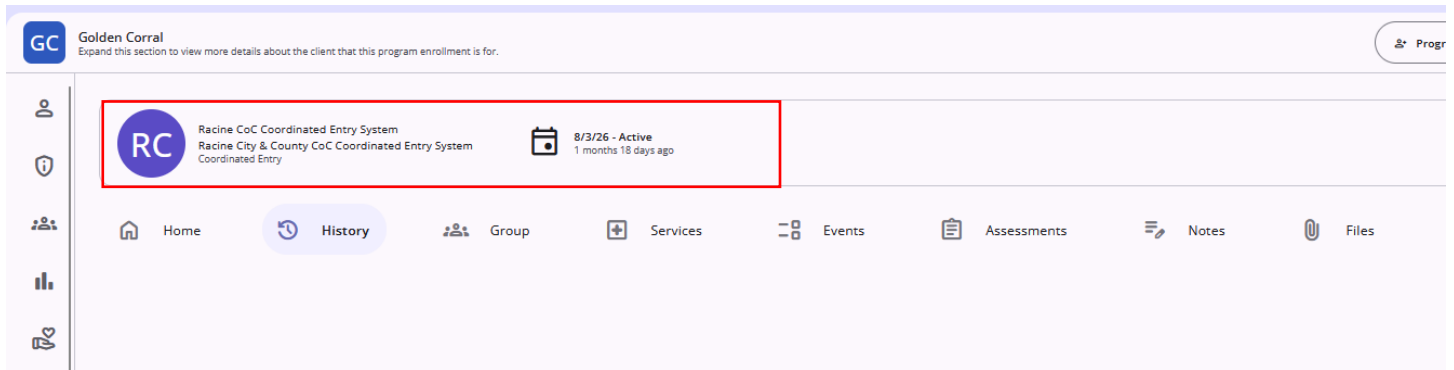
Now that the client is enrolled in the CE Program, any subsequent interactions including referral follow-ups, phone conversations, meetings, etc. will **all** be documented within the CE Program Enrollment. Updates should be completed **every 30 days**.

To document updates, you will need to go into the Head of Household's Program Enrollment for the Racine CoC Coordinated Entry Program.

- Click on the **Active Enrollment** tab. This will bring you to the **Active Enrollments** tab, where you will click on the Head of Household's name.

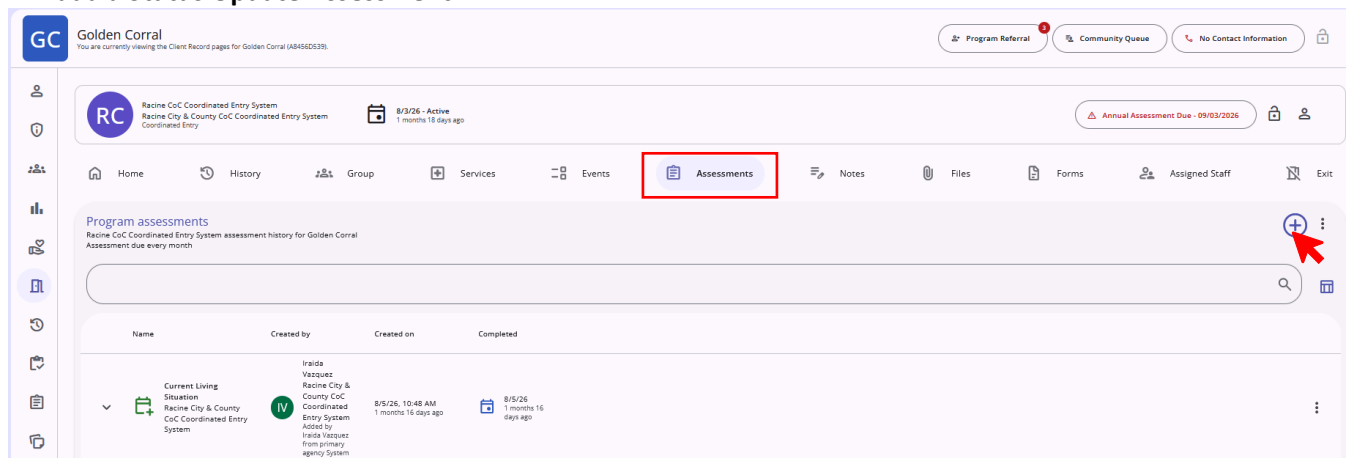
Active enrollments Active client enrollments you have created or were assigned to				
Client	Program Name	Start Date	Created by	
✓ Dumpty, Humpty 0E7203859	HALO APOMO PSH PH - Permanent Supportive Housing (disability required for entry) HALO, Inc.	8/5/26 1 months 16 days ago	Iraida Vazquez HALO, Inc. Added by Iraida Vazquez from primary agency System	
✓ Doe, Jon 218A44656	HALO Inc Women and Families Shelter Emergency Shelter - Entry Exit HALO, Inc.	7/15/26 2 months 6 days ago	Iraida Vazquez HALO, Inc. Added by Iraida Vazquez from primary agency System	
✓ Corral, Golden A8456D539	Racine CoC Coordinated Entry System Racine City & County CoC Coordinated Entry System	8/3/26 1 months 18 days ago	Iraida Vazquez Racine City & County CoC Coordinated Entry System Added by Iraida Vazquez from primary agency System	
✓ Dodge, Kathleen 3A1E66457	Racine CoC Coordinated Entry System Racine City & County CoC Coordinated Entry System	9/8/26 13 days ago	Iraida Vazquez Racine City & County CoC Coordinated Entry System Added by Iraida Vazquez from primary agency System	

- This will bring you directly into the History tab of the Head of Household's Program Enrollment for the Racine CoC Coordinated Entry Program. **It is important that you complete all data entry and updates within the Coordinated Entry Program Enrollment.**

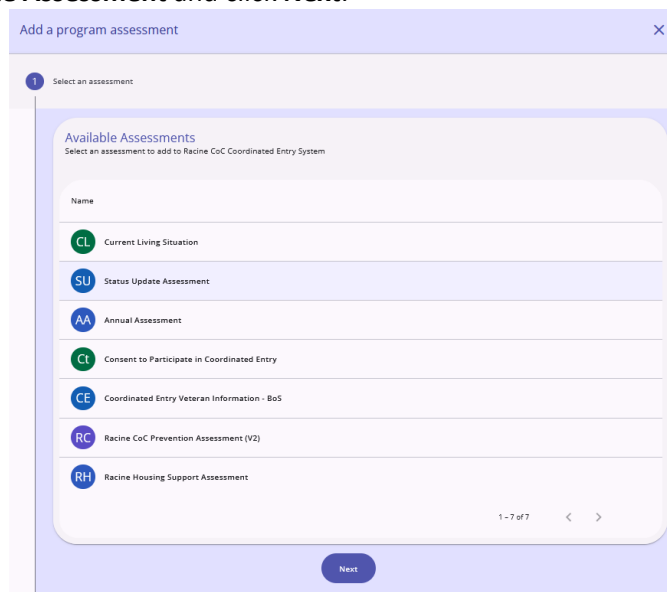


Step 1: Add a Status Update Assessment

- Once you are in the Head of Household's Program Enrollment, click on the **Assessments** tab. Then click  to add a **Status Update Assessment**.

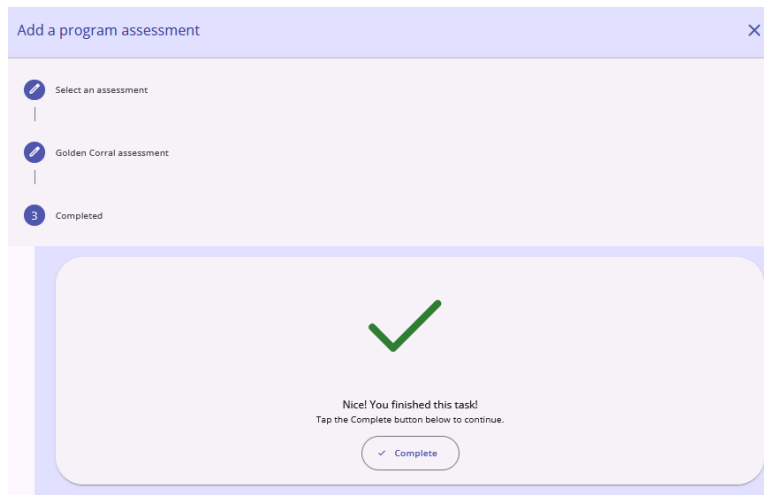


- Next, select **Status Update Assessment** and click **Next**.



- Make sure to include additional group 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. You do not need to complete the Coordinated Entry Staffing Information at this time. 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 fields to update on the Status Update Assessment for children under the age of 18. You are simply going to make sure the **Project Status Date** is correct for the child, and then click **Save & Complete**.

Step 2: Add a Current Living Situation Assessment

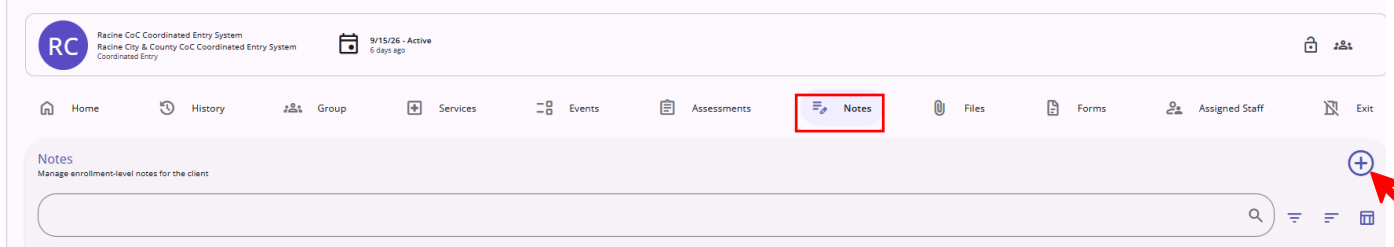
- When completing the Status Update Assessment if the client / household's living situation has changed since the last update, you will also need to add a new Current Living Situation Assessment.
- Follow the steps outlined in the [Add a Current Living Situation Assessment](#) section of this guide to create a new Current Living Situation Assessment.

Step 3: Add a Note

If the client / household's living situation has changed since the Assessment was completed or since the last Status Update, move on to Step 2.

If the client / household remains in the same living situation from the last Status Update, move on to Step 3.

- Now click on the **Notes** tab within the program enrollment. Then click the  to **Add Note**.



- Complete all relevant information on the Add Note page, then click **Add Record** once complete.
 - Title – *add a title for your note*
 - Category – *select "Coordinated Entry"*
 - Date – *select the date on which you completed the update*
 - Time Tracking – *leave blank*

Add Note

New Note
Add a note for Jon Doe

Title *
Updated Completed, client remains on CE PL

Category *
Coordinated Entry

Date *
09/21/2026

Hours
Select

Minutes
Select

Note *

Client is still in shelter, updated CE status update with length of time homeless

Cancel
Save

- The Note will appear on the **Notes** tab in the program enrollment.

Home

History

Group

Services

Events

Assessments

Notes

Files

Forms

Assigned Staff

Exit

Notes

Manage enrollment-level notes for the client

Name	Category	Date	Created by
▼ UC Updated Completed, client remains on CE PL Racine City & County CoC Coordinated Entry System	Coordinated Entry	9/21/26	IV Iraida Vazquez Racine City & County CoC Coordinated Entry System Added by Iraida Vazquez from primary agency System
▼ C Consent Racine City & County CoC Coordinated Entry System	Coordinated Entry	9/14/26	IV Iraida Vazquez Racine City & County CoC Coordinated Entry System Added by Iraida Vazquez from primary agency System

1 - 2 of 2

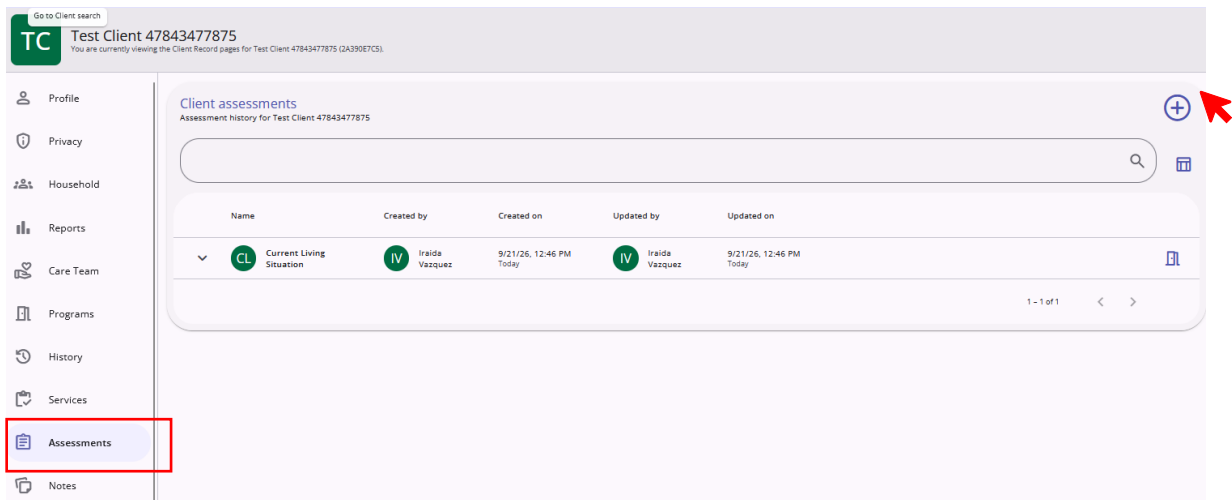
<

>

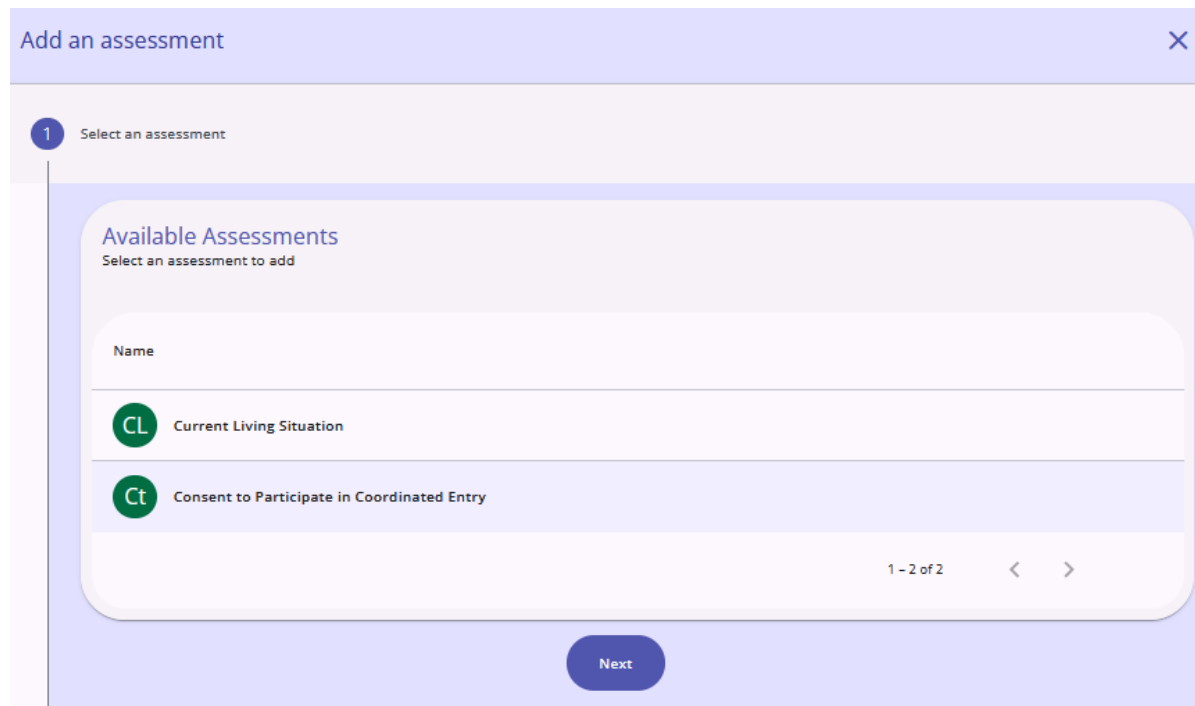
DOCUMENTING CLIENTS THAT DECLINE PARTICIPATION IN COORDINATED ENTRY

If a client is offered the opportunity to receive a Coordinated Entry assessment and referral and they decline, you will need to document this information in the client file.

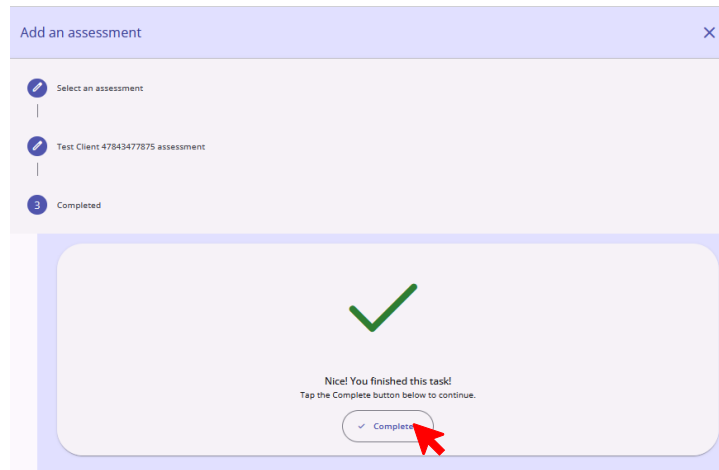
- Go to the Head of Household's client file and navigate to the main-level **Assessments** tab.
- Click the  on the **Client Assessments** page to add a new assessment.



- Next, select the **Consent to Participate in Coordinated Entry** and click **Next**.



- Complete the assessment questions.
 - Assessment Date – *this should be the date that a Coordinated Entry assessment and referral were offered to the client and they declined.*
 - Does the client consent to participate in Coordinated Entry? – *select “No”*
 - Click **Save** and **Complete**.



- If a client eventually accepts an opportunity to receive a Coordinated Entry assessment and referral, create an enrollment and follow the steps outlined in [Adding an Individual or Household to the Coordinated Entry System](#) at that time.

REMOVING A CLIENT FROM THE COORDINATED ENTRY SYSTEM

You will remove a client from the Coordinated Entry System if they are no longer in need of housing assistance, if the referring agency is unable to contact the client, or if the client requests to be removed from the Coordinated Entry System.

There are two steps to removing a client from the Coordinated Entry System:

1. Remove the client referral from the Community Queue
2. Exit the client from the Racine CoC Coordinated Entry Program

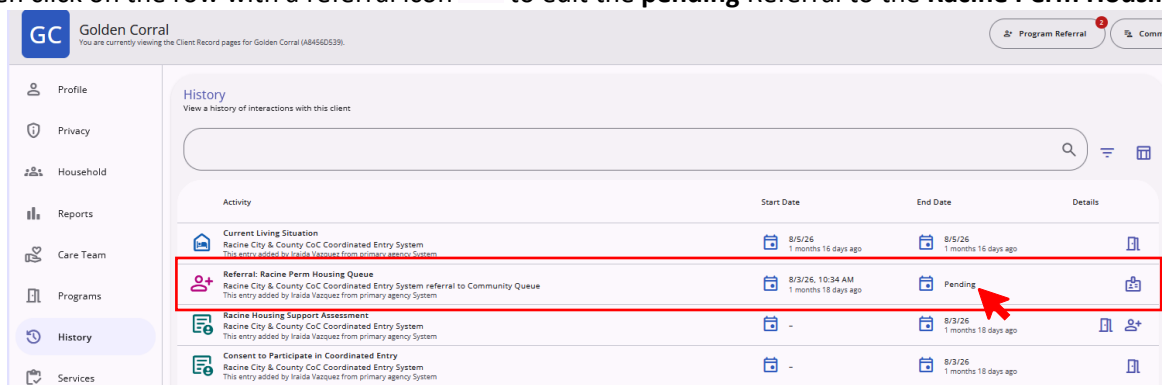
Before you begin, make sure that you are switched into the Racine City and County CoC Coordinated Entry System agency.



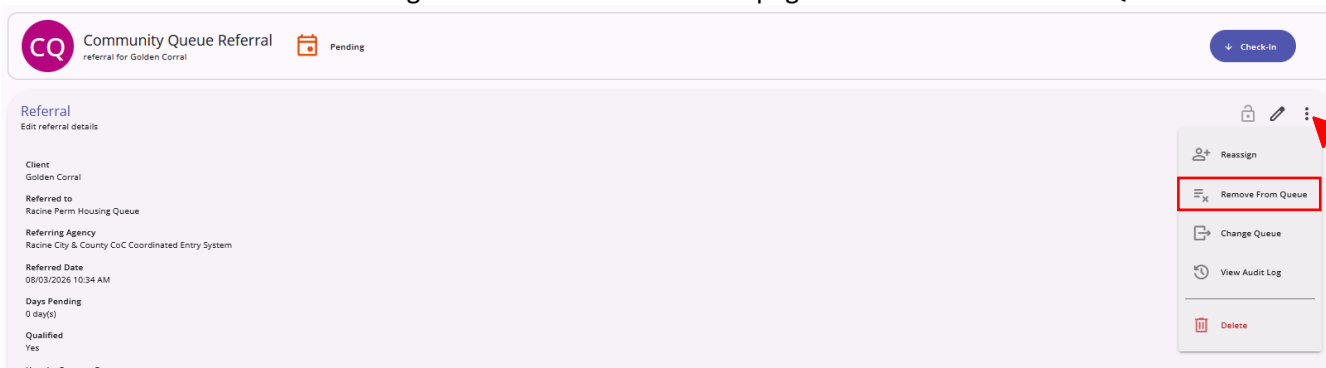
Step 1: Remove the Client from the Community Queue

- Go to the client's file and click on the **History** tab (if the household consists of more than one person, go the Head of Household's file).

Then click on the row with a referral icon  to edit the **pending** Referral to the **Racine Perm Housing Queue**.



- Next click on the  on the right-hand side of the Referral page to select **Remove From Queue**



Community Queue Referral
referral for Golden Corral

Pending

Referral
Edit referral details

Client
Golden Corral

Referred to
Racine Perm Housing Queue

Referring Agency
Racine City & County CoC Coordinated Entry System

Referred Date
08/03/2026 10:34 AM

Days Pending
0 day(s)

Qualified
Yes

HousingSupport Score

Reassign

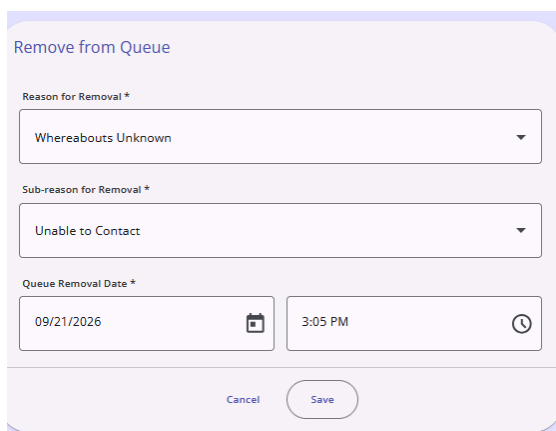
Remove From Queue

Change Queue

View Audit Log

Delete

- Scroll to the **Remove from Queue** section of the referral.
 - Select the appropriate **Reason for Removal**. If there is a secondary field that appears, be sure to complete that field as well.
 - Select the **Queue Removal Date**.
 - Click **Save**.



Remove from Queue

Reason for Removal *

Whereabouts Unknown

Sub-reason for Removal *

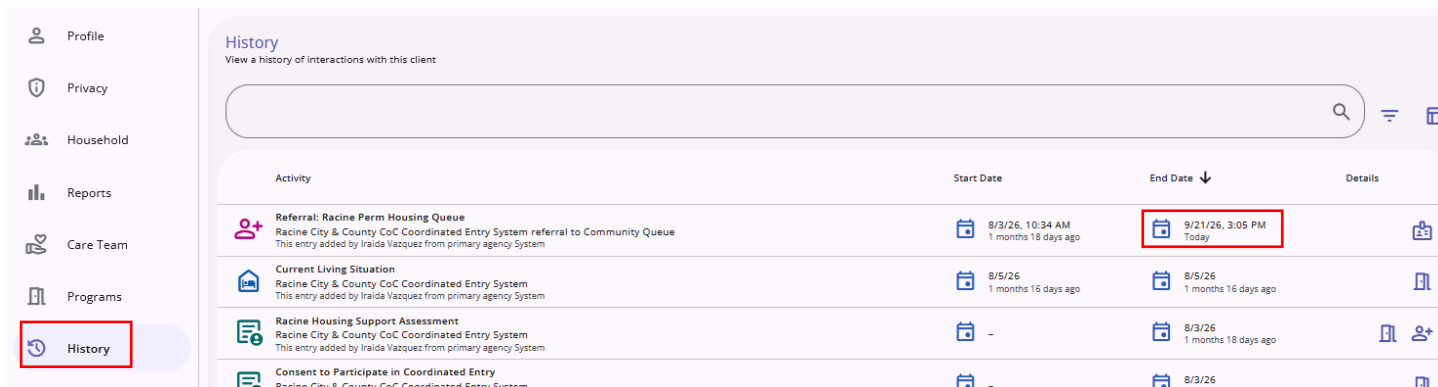
Unable to Contact

Queue Removal Date *

09/21/2026 3:05 PM

Cancel Save

- In the **History** tab, you will now see that the Referral has an End Date and is closed.



History
View a history of interactions with this client

Activity	Start Date	End Date ↓	Details
Referral: Racine Perm Housing Queue Racine City & County CoC Coordinated Entry System referral to Community Queue This entry added by Iralda Vazquez from primary agency System	8/3/26, 10:34 AM 1 months 18 days ago	9/21/26, 3:05 PM Today	
Current Living Situation Racine City & County CoC Coordinated Entry System This entry added by Iralda Vazquez from primary agency System	8/5/26 1 months 16 days ago	8/5/26 1 months 16 days ago	
Racine Housing Support Assessment Racine City & County CoC Coordinated Entry System This entry added by Iralda Vazquez from primary agency System	-	8/3/26 1 months 18 days ago	
Consent to Participate in Coordinated Entry Racine City & County CoC Coordinated Entry System	-	8/3/26 1 months 18 days ago	

Step 2: Exit the Household from the Racine CoC Coordinated Entry System Program

- While you are still in the Head of Household's file, click on the **Programs** tab. Click the row with an Active **Enrollment** in the Racine CoC Coordinated Entry System program.

GC Golden Corral
You are currently viewing the Client Record pages for Golden Corral (A84560539).

Program Referral

Profile
Privacy
Household
Reports
Care Team
Programs

Program enrollments

Program enrollment history for Golden Corral

Program Name	Entry Date	Exit Date	Created by
RC Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System	8/3/26 1 months 18 days ago	Active	IV Iralda Vazquez Racine City & County CoC Coordinated Entry System Added by Iralda Vazquez from primary agency System
NI Northern Illinois Coordinated Entry System Coordinated Entry Rockford/DeKalb, Winnebago, & Boone Counties CoC	7/21/26 2 months ago	Active	JW Joyce Williams Rockford/DeKalb, Winnebago, & Boone Counties CoC Added by Joyce Williams from primary agency System

- Click **Exit** to navigate to adding an Exit Screen and click + to record the client Program Exit.

RC Racine CoC Coordinated Entry System
Racine City & County CoC Coordinated Entry System
Coordinated Entry

8/3/26 - Active
1 months 18 days ago

Annual Assessment Due - 09/03/2026

Home History Group Services Events Assessments Notes Files Forms Assigned Staff **Exit**

Program enrollment: Exit
Exit Golden Corral from Racine CoC Coordinated Entry System

Exit program
Exit the program with a new screen.

- Fill in the **Project Exit Date** and the **Destination** information. Then click **Save & Next**.

Add an exit

1 Golden Corral exit screen

Program enrollment: Exit

Exit data collection for Golden Corral

Project Exit Date *

09/21/2026

MM/DD/YYYY

Destination *

No exit interview completed

REMINDER: Remove the Head of Household's referral from the Community Queue after exiting the household from the Coordinated Entry program

Save & Next

2 Completed

- Click **Complete**. The household is now exited from the Racine CoC Coordinated Entry program and is fully removed from the Coordinated Entry System.

Add an exit

1 Golden Corral exit screen

2 Completed

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

Complete

IMPORTANT NOTE: Exits to Permanent Housing Removes household from the Coordinated Entry System

- A client will also be automatically removed from the Coordinated Entry System if they are exited from another program (ex: emergency shelter, street outreach, prevention, etc.) into a permanent destination.

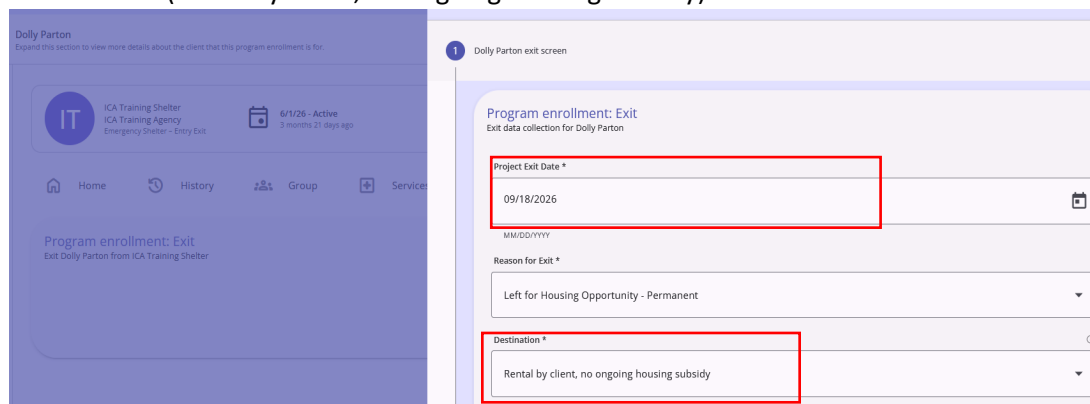
EXAMPLE OF WHAT THIS LOOKS LIKE IN CLARITY

- A client is enrolled in the **Racine CoC Coordinated Entry System** program and the **ICA Racine Training Shelter** program at the same time.

Program Name	Entry Date	Exit Date	Created by
 Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System	 7/23/26 1 months 30 days ago	 Active	 Iraida Vazquez Racine City & County CoC Coordinated Entry System Added by Iraida Vazquez from primary agency System
 ICA Training Shelter Emergency Shelter – Entry Exit ICA Training Agency	 6/1/26 3 months 21 days ago	 Active	 Iraida Vazquez ICA Training Agency Added by Iraida Vazquez from primary agency System

1 - 2 of 2

- A staff member at the **ICA Racine Training Shelter** exits the client from their program on 9/18/2026 into a permanent destination (rental by client, no ongoing housing subsidy).



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

 **ICA Training Shelter**
ICA Training Agency
Emergency Shelter – Entry Exit

6/1/26 - Active
3 months 21 days ago

Home History Group Services

Program enrollment: Exit
Exit Dolly Parton from ICA Training Shelter

Program enrollment: Exit
Exit data collection for Dolly Parton

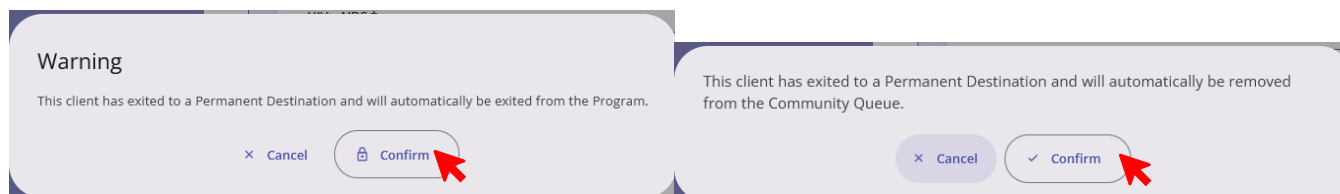
Project Exit Date *
09/18/2026

MM/DD/YYYY

Reason for Exit *
Left for Housing Opportunity - Permanent

Destination *
Rental by client, no ongoing housing subsidy

- When the staff member hits **Save & Next**– at the bottom of the exit screen, two messages will appear on their screen informing them that the client will be removed from the Community Queue and exited from their Coordinated Entry enrollment.



Warning
This client has exited to a Permanent Destination and will automatically be exited from the Program.

× Cancel Confirm

This client has exited to a Permanent Destination and will automatically be removed from the Community Queue.

× Cancel Confirm

The staff member will click **Confirm** to proceed.

- On the **Programs** tab, we can now see that the client was automatically exited from the **Racine CoC Coordinated Entry** program on 9/18/2026. The Project Exit Date and the Destination will match the information that was documented on the **ICA Training Shelter** program exit.

Program Name	Entry Date	Exit Date	Created by
 Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System	 7/23/26 1 months 30 days ago	 9/18/26 4 days ago	 Iraida Vazquez Racine City & County CoC Coordinated Entry System Added by Iraida Vazquez from primary agency System
 ICA Training Shelter Emergency Shelter - Entry Exit ICA Training Agency	 6/1/26 3 months 21 days ago	 9/18/26 4 days ago	 Iraida Vazquez ICA Training Agency Added by Iraida Vazquez from primary agency System


Racine CoC Coordinated Entry System
 Racine City & County CoC Coordinated Entry System
 Coordinated Entry

 7/23/26 - 9/18/26
4 days ago

Events Home History Group Assessments Notes

Program enrollment: Exit

Project Exit Date
 09/18/2026

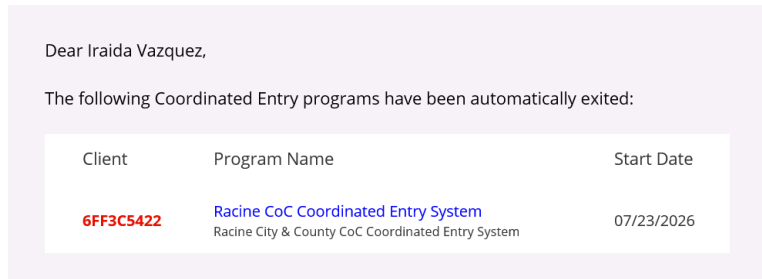
Destination
 Rental by client, no ongoing housing subsidy

 **REMINDER:** Remove the Head of Household's referral from the Community Queue after exiting the household from the Coordinated Entry prog

- In the **History** tab, we can see that the Referral to the Racine Perm Housing Queue was closed on 9/22/2026 as the exit from ICA Training Agency was recorded in Clarity versus 9/18/2026 when it was backdated.

History			
View a history of interactions with this client			
Activity	Start Date	End Date	Details
 Referral: Racine Perm Housing Queue Racine City & County CoC Coordinated Entry System referral to Community Queue This entry added by Iraida Vazquez from primary agency System	 7/23/26, 3:11 PM 1 months 30 days ago	 9/22/26, 3:27 PM Today	
 Racine Housing Support Assessment Racine City & County CoC Coordinated Entry System This entry added by Iraida Vazquez from primary agency System	 -	 7/23/26 1 months 30 days ago	
 Consent to Participate in Coordinated Entry Racine City & County CoC Coordinated Entry System This entry added by Iraida Vazquez from primary agency System	 -	 7/23/26 1 months 30 days ago	
 Current Living Situation Racine City & County CoC Coordinated Entry System This entry added by Iraida Vazquez from primary agency System	 7/23/26 1 months 30 days ago	 7/23/26 1 months 30 days ago	
 Racine CoC Coordinated Entry System Racine City & County CoC Coordinated Entry System This entry added by Iraida Vazquez from primary agency System	 7/23/26 1 months 30 days ago	 9/18/26 4 days ago	
 Current Living Situation ICA Training Agency This entry added by Iraida Vazquez from primary agency System	 6/1/26 3 months 21 days ago	 6/1/26 3 months 21 days ago	
 ICA Training Shelter ICA Training Agency This entry added by Iraida Vazquez from primary agency System	 6/1/26 3 months 21 days ago	 9/18/26 4 days ago	

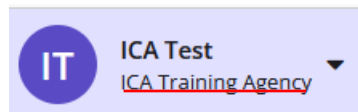
- The staff member that created the enrollment and referral will receive a notification through the Clarity messaging system that the client has been automatically removed from the Coordinated Entry program.



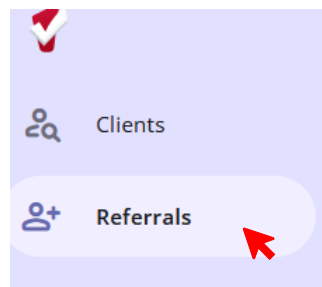
ACCEPTING A REFERRAL FROM THE LIST

Getting Started

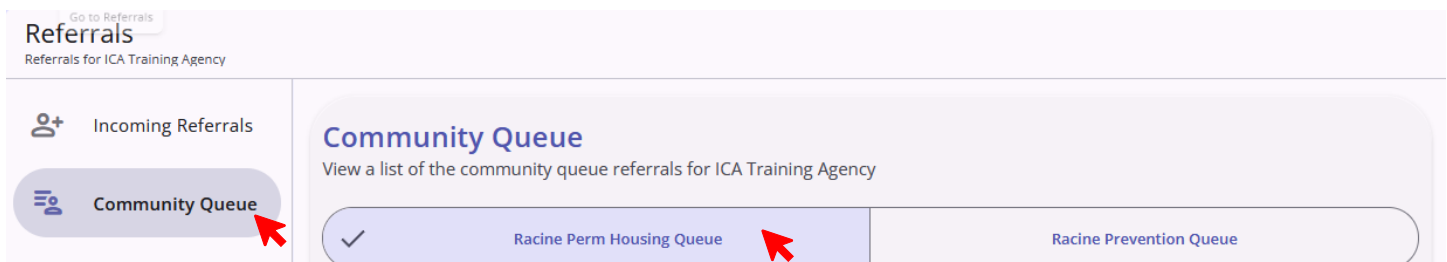
- First make sure you are switched into the agency accepting the client (generally your primary agency).
 - You cannot be switched into the “Racine City and County CoC Coordinated Entry System” agency to complete this step.



- While you are on the home page, you will see the **Referrals** tab is visible. Click on the **Referrals** tab.



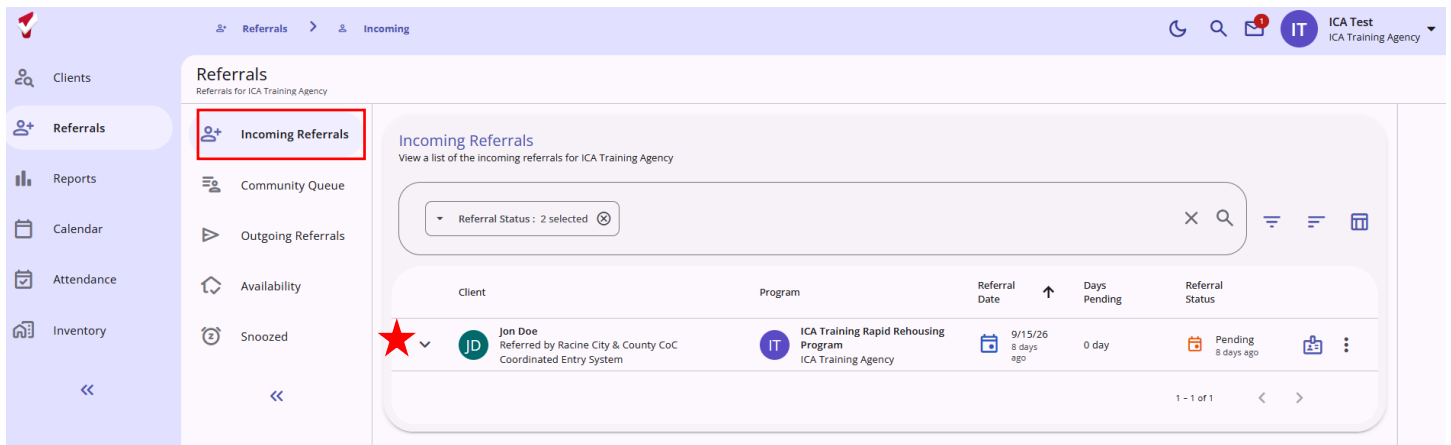
- Click on the **Community Queue** tab, and make sure the **Racine Perm Housing Queue** is selected.



Reassign the Referral to Your Agency's Program

The Coordinated Entry System Administrator 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.

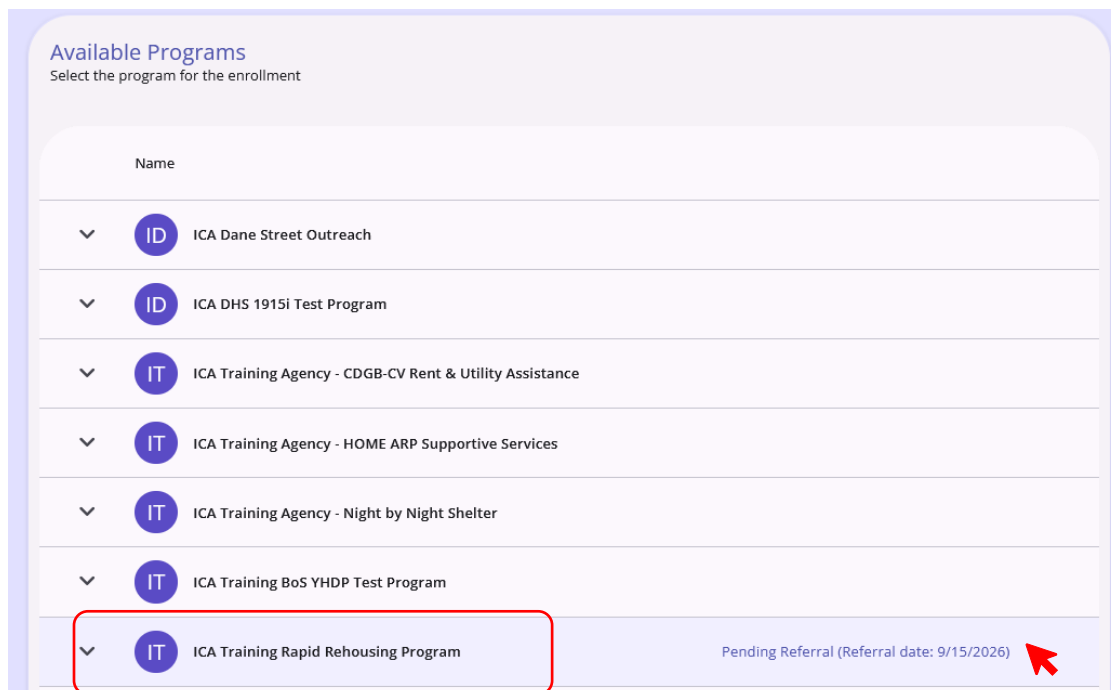
- The Coordinated Entry System Administrator/Matchmaker reassigns the referral from the Community Queue to your agency's program. If you click on the **Incoming Referrals** tab, you will now see the client's referral is pending for your agency to review.



- From here your agency will either:
 - Enroll the client / household into your agency's program.
 - Deny the referral and...
 - Send the referral back to the Community Queue, OR
 - Completely close the referral if the client no longer needs or wants assistance.

Enrolling a client with an Accepted Referral

- If a client is eligible for and accepts the offered programming, you will then enroll the client into the program for which the client prioritized.
- When you click to enroll the client into the program, you will notice there is a toggle on the left side of the screen that will say **"Pending Referral (Referral date: xx/xx/xxxx)"**. Make sure to select the correct program to enroll the client into and click **Next**.



- Complete the enrollment as you normally would. When you view the **Programs** tab, you will see the enrollment has a small referral link icon  on the right side of the page. This indicates that the enrollment was linked to the Coordinated Entry referral, and that you completed the enrollment correctly.
 - NOTE: at this point you have accepted the Coordinated Entry referral, but the Coordinated Entry Enrollment remains active. The enrollment will remain active while the client is in housing search.

Program enrollments
Program enrollment history for Jon Doe

Program Name	Entry Date	Exit Date	Created by
 ICA Training Rapid Rehousing Program PH – Rapid Re-Housing ICA Training Agency	 9/23/26 Today	 Active	 ICA Test ICA Training Agency Added by ICA Test from primary agency HALO, Inc.
 Racine CoC Coordinated Entry System Coordinated Entry Racine City & County CoC Coordinated Entry System	 9/15/26 8 days ago	 Active	 Iraida Vazquez Racine City & County CoC Coordinated Entry System Added by Iraida Vazquez from primary agency System
 HALO Inc Women and Families Shelter Emergency Shelter – Entry Exit HALO, Inc.	 7/15/26 2 months 8 days ago	 Active	 Iraida Vazquez HALO, Inc. Added by Iraida Vazquez from primary agency System

EXITING THE CLIENT FROM THE COORDINATED ENTRY SYSTEM

- The client will be completely removed from the Coordinated Entry System once they have secured housing and a **Housing Move-In Date** has been documented.
- When you go into the client's Enrollment and enter the Housing Move-In Date, a screen will pop up asking to confirm that the client is housed and will be exited from the Coordinated Entry enrollment. Click **Confirm**.

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

Housing Move-In Date

09/23/2026

MM/DD/YYYY

Total Monthly Rent Amount listed on Lease (not client subsidy) *

\$ 1000

Zip Code of Rental Unit *

53403

Warning

This client has exited to a Permanent Destination and will automatically be exited from the Program. Please review other household members as well.

- The client will now be exited from the **Racine CoC Coordinated Entry System** program, with an exit destination reflecting the program they have been housed through.

Racine CoC Coordinated Entry System
Racine City & County CoC Coordinated Entry System
Coordinated Entry

9/15/26 - 9/23/26
Today

Events
Home
History
Group
Assessments
Notes
Files
Forms
Assigned Staff
Exit

Program enrollment: Exit

Project Exit Date
09/23/2026

Destination
Rental by client, with ongoing housing subsidy

Rental Subsidy Type
RRH or equivalent subsidy

Denying a Prioritized Referral

- If a client declines the offered programming for which they have prioritized, or a program denies a referral due to a client's ineligibility for the program, the referral must be documented as **Denied**.

1. Click on the **Referrals** tab from the home page.
2. Next click on the **Incoming Referrals** tab,
3. Search for the client. Then click on the row to edit the pending referral.

Clients

Referrals

Reports

Calendar

Attendance

Merge

Outlook

Referrals

Incoming Referrals

Community Queue

Outgoing Referrals

Availability

Open Units

Incoming Referrals

View a list of the incoming referrals for ICA Training Agency

Referral Status : 2 selected

Client	Program	Referral Date	Days Pending	Referral Status
Test Client 47843477875 Referred by Racine City & County CoC Coordinated Entry System	ICA Training Rapid Rehousing Program ICA Training Agency	9/22/26 1 days ago	0 day	Pending 1 days ago

- Change the **Current Status** to "Denied". Click on the edit pencil in the upper right corner of the referral details page.

Program Referral
ICA Training Rapid Rehousing Program referral for Test Client 47843477875

Pending

Check-In
View Client

Referral

Edit referral details

Referred Program
ICA Training Rapid Rehousing Program

Referred To Agency
ICA Training Agency

Referring Agency
Racine City & County CoC Coordinated Entry System

Referred Date
09/22/2026 11:54 AM

Days Pending
0 day(s)

In Process
0 day(s)

Housing/Support Score
240

Qualified
Reassigned

Staff Home Agency
System

Referred by Staff
Iraida Vazquez

Case Manager
No value

Last Activity
9/23/2026

Current Status
Pending

Note from customer portal
No

- When you change the status, additional fields will appear. Complete the fields accordingly, then click **Save Changes**.
 - Send to Community Queue – Select “Yes” to return to the client to the Community Queue, or “No” to completely close the client’s referral.
 - Denied by Type – select “Client” or “Provider”.
 - Denied Reason – select appropriate answer.
 - Denied Information – **REQUIRED**. Document notes on why the referral was denied.

Denied by Type *

Provider

Denied by Reason *

Client did not show up or call

Current Status *

Denied

Denial Information *

Unable to contact client, attempted to reach client in shelter and via street outreach over a week and no response, no case managers have been able to locate client, no phone number available and no other contact information available.

Status Date *

09/23/2026 11:16 AM

Send to Community Queue *

☒ No ☐ Yes

☐ Hide from customer portal

Cancel Save

- This information will now show up in the **History** section of the referral.

History

View the history for the referral

Activity	Date	Days Pending	Staff
Denied: ICA Training Rapid Rehousing Program, ICA Training Agency	09/23/2026 11:16 AM 09/23/2026 11:21 AM	0	Iraida Vazquez ICA Training Agency
Program Referral: ICA Training Rapid Rehousing Program, ICA Training Agency	09/23/2026 10:54 AM 09/23/2026 10:54 AM	1	Iraida Vazquez Racine City & County CoC Coordinated Entry System
Added to Community Queue: Racine Perm Housing Queue	09/22/2026 11:54 AM 09/22/2026 11:55 AM	0	Iraida Vazquez Racine City & County CoC Coordinated Entry System

- It also will be visible in the Client’s File on the **History** tab.

History

View a history of interactions with this client

Type: Any

Activity	Start Date	End Date	Details
Referral to RRH project resource opening: Referral to RRH project resource opening Racine City & County CoC Coordinated Entry System This entry added by Iraida Vazquez from primary agency system	9/23/26 Today	9/23/26 Today	
Referral: ICA Training Rapid Rehousing Program Racine City & County CoC Coordinated Entry System referral to ICA Training Agency This entry added by Iraida Vazquez from primary agency system	9/22/26 11:54 AM 1 days ago	Denied From now	
Racine Housing Support Assessment Racine City & County CoC Coordinated Entry System This entry added by Iraida Vazquez from primary agency system	-	9/22/26 1 days ago	
Consent to Participate in Coordinated Entry Racine City & County CoC Coordinated Entry System This entry added by Iraida Vazquez from primary agency system	-	9/22/26 1 days ago	
Current Living Situation Racine City & County CoC Coordinated Entry System This entry added by Iraida Vazquez from primary agency system	9/22/26 1 days ago	9/22/26 1 days ago	
Racine CoC Coordinated Entry System Racine City & County CoC Coordinated Entry System This entry added by Iraida Vazquez from primary agency system	9/22/26 1 days ago	Active	