

Wisconsin Balance of State Coordinated Entry HMIS Guide

Institute for Community Alliances

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INTRODUCTION

This guide is intended to complement the WI Balance of State's 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 WI Balance of State CoC Coordinated Entry Process can be found here:

<https://www.wiboscoc.org/ce.html>

COORDINATED ENTRY DATA ENTRY FOR ALL USERS

Anyone with an HMIS user license that has completed the prerequisite Coordinated Entry trainings 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 their household to participate in Coordinated Entry in HMIS.
2. A completed WI Balance of State Coordinated Entry Prescreen form.
3. A signed WI Balance of State Coordinated Entry Client Rights and Responsibilities form.

GETTING STARTED

☐ Determine Which Priority List the Household Needs a Referral To

There are three prioritization lists in Clarity Human Services that a household can be referred to:

Priority List	Possible Interventions / Programs
Balance of State CE Homeless Prioritization List – Households <u>with</u> Children • Household is literally homeless (Category 1 homeless) or fleeing / attempting to flee domestic violence (Category 4 homeless) • The household consists of at least one adult (age 18+) and one child (age 17 and under)	• Transitional Housing • Rapid Re-Housing • Permanent Supportive Housing • Other Permanent Housing
Balance of State CE Homeless Prioritization – Households <u>without</u> Children • Client is literally homeless (Category 1 homeless) or fleeing / attempting to flee domestic violence (Category 4 homeless) • The client is an individual adult with no additional household members, or the household consists entirely of adults (age 18+)	• Transitional Housing • Rapid Re-Housing • Permanent Supportive Housing • Other Permanent Housing
Balance of State CE Prevention Prioritization List • Client / household is at risk of homelessness, at imminent risk of homelessness (Category 2 homeless), or fleeing / attempting to flee domestic violence (Category 4 homeless) • All household types (with and without children) are referred to this one list	• Homeless Prevention

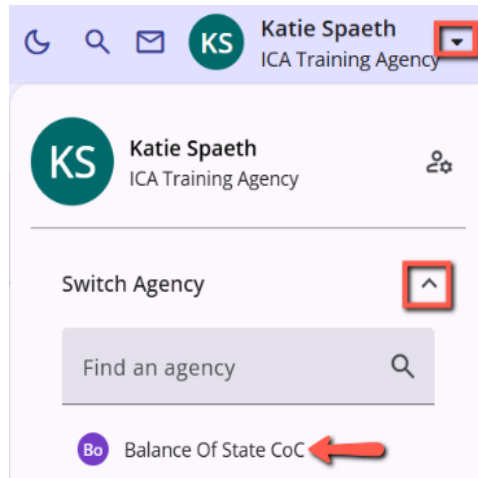
For more information about the different categories of homelessness, click the links below to review resources from HUD:

- [Criteria for Defining At Risk of Homelessness](#)
- [Criteria for Defining Homelessness \(Categories 1, 2, 3 and 4\)](#)

□ Log into Clarity Human Services

- To make referrals to the Coordinated Entry Priority Lists, switch into the “Balance of State CoC” agency.

In the upper right corner of the screen, locate the name of your primary agency (listed below your name). Click on the arrow to the right of your primary agency and click on “Balance of State CoC” from the dropdown to switch into the agency.



NOTE: Access to the Balance of State CoC agency is only granted to end users that have completed all Wisconsin Balance of State Coordinated Entry training requirements.

□ Create or Confirm Existing Client Profiles

- 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](#).

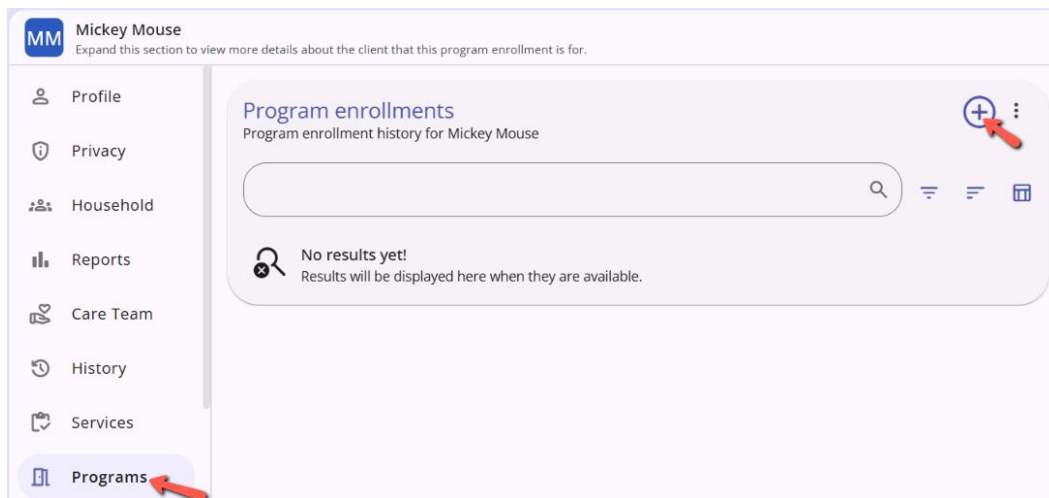
ADD THE HOUSEHOLD TO THE COORDINATED ENTRY PRIORITY LIST

□ Step 1: Create the Program Enrollment

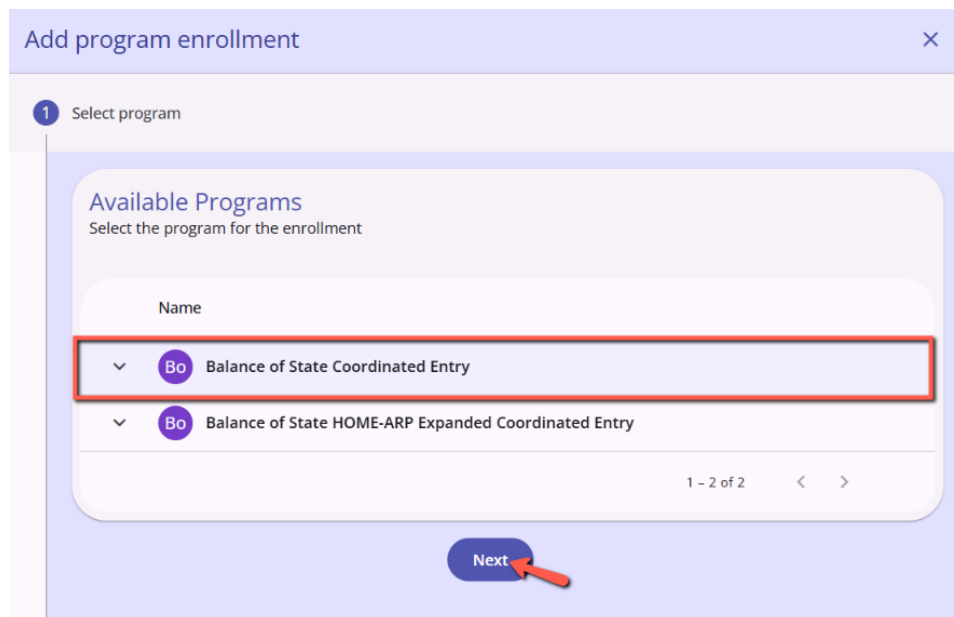
➤ Households with Children

➤ Households without Children
Who Want to Be Assessed Together

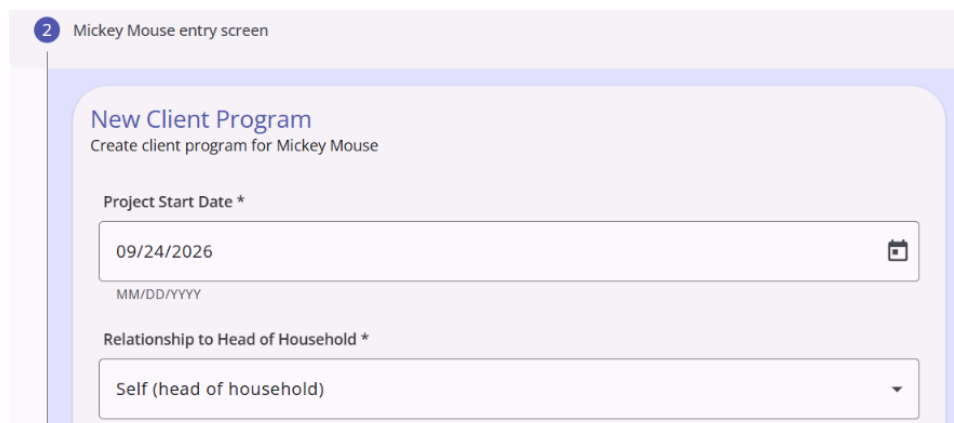
- Go to the Head of Household’s file and navigate to the **Programs** tab on the left side of the screen. Click the plus icon and select the “Balance of State Coordinated Entry” program under the **Available Programs** heading.



- Once “Balance of State Coordinated Entry” is highlighted, click **Next**.



- This will lead to the Enrollment screen for the Head of Household. Complete all fields on the screen.



► 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 appear if there are multiple household members. Select “Self (head of household)”.*
- 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 – *provide email and/or phone number of the staff member completing the interview*
- BoS Agency Name – *select the interviewer’s agency of employment*
- In which county is the client currently located? – *select the county the client is currently living in*

Living Situation at Time of Assessment

- Type of Residence – *where is the client currently sleeping?*
- Length of Stay in that Residence – *how long has the client been sleeping in the above-noted location?*
- Length of Stay Less Than 7 Nights or Length of Stay Less Than 90 Days – *select “Yes” or “No”. One of these two questions will appear if the “Type of Residence” is anything other than Emergency Shelter, Place Not Meant for Habitation, or Safe Haven.*
- On the night before – stayed on the streets, ES, or Safe Haven - *select “Yes” or “No”. This question will only appear if “Length of Stay Less Than 7 Nights” or “Length of Stay Less Than 90 Days” is “Yes”.*
- Approximate date this episode started – *the date the client’s **most recent episode** of literal homelessness began. This is often (not always) different from the date the client’s overall literal homelessness began.*
- Number of times on the streets, in ES, or SH in the past three years – *this is asking for the number of distinct episodes of homelessness.*
- Total number of months homeless on the streets, in ES, or Safe Haven in the past three years – *select the appropriate number of months.*
 - If “More than 12 Months” is selected, an additional question will appear asking for the total number over 12 months.

Disabling Conditions and Barriers

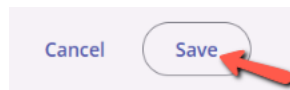
- Disabling Condition – *does the client have a disabling condition?*
- Survivor of Domestic Violence – *select “Yes” or “No”. If yes, the following questions will appear:*
 - When experience occurred
 - Are you currently fleeing? – *select “Yes” or “No”. If yes, the following questions will appear:*
 - What is the approximate date that you began to make plans to look for housing to leave your current abusive situation?
 - How many times have you left or attempted to leave your abusive situation?
- Cause of Homelessness or Housing Instability – *select all that apply.*

Housing-Specific Needs

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

Priority List(s) Referred To

- Activate the toggle for the local CoC priority list(s) that the household wishes to be referred to and click **Save**. This will lead to the Current Living Situation for the Head of Household.

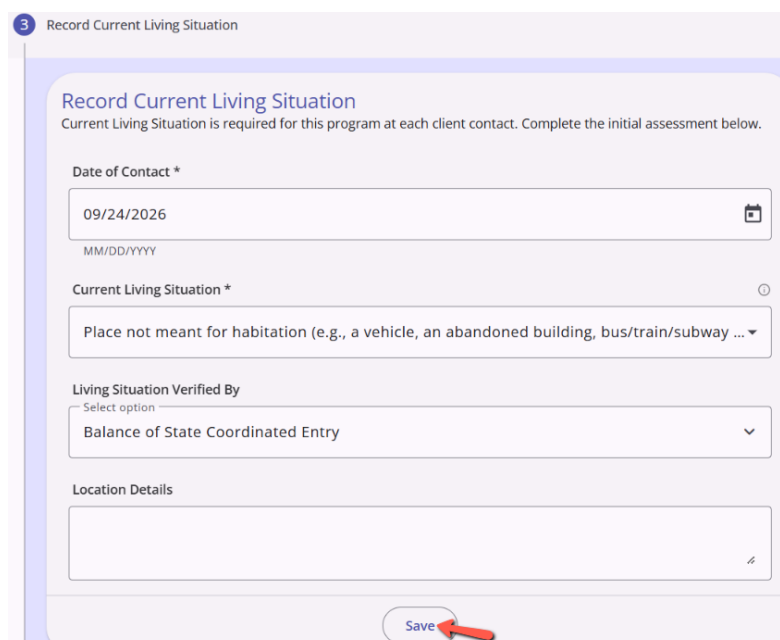


► CURRENT LIVING SITUATION

- Complete the Current Living Situation assessment.
 - Date of Contact – *this should match the enrollment date / the date the client completed the Coordinated Entry Assessment.*
 - Current Living Situation – *where is the household currently staying? This should match what is reported on the Enrollment screen.*
 - Living Situation Verified By – *select from the dropdown the appropriate program at your agency.*

If the client's Current Living Situation is anything other than Place Not Meant for Habitation, Emergency Shelter, or Safe Haven, the following question(s) will appear on the screen and are required to be answered:

- Is client going to have to leave their current living situation within 14 days? – *Yes or No*
 - If yes, the following additional questions will appear and need to be answered:
 - Has a subsequent residence been identified? – *Yes or No*
 - Does individual or family have resources or support networks to obtain other permanent housing? – *Yes or No*
 - Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days? – *Yes or No*
 - Has the client moved 2 or more times in the last 60 days? – *Yes or No*
 - Location Details – *add any notes relevant to the client's current living situation (optional)*
- After completing the Current Living Situation, click **Save**.



3 Record Current Living Situation

Record Current Living Situation
Current Living Situation is required for this program at each client contact. Complete the initial assessment below.

Date of Contact *

09/24/2026

MM/DD/YYYY

Current Living Situation *

Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway ...)

Living Situation Verified By

Select option

Balance of State Coordinated Entry

Location Details

Save

- Activate the toggles for additional household members (any other adults and children) to include in the enrollment. Then click **Next**.

- The Enrollment screen questions for each household member will auto-populate depending on their age and relationship to the Head of Household.
NOTE: After completing the Enrollment screen for any other adult household members, a [Current Living Situation](#) will populate for them.

► ENROLLMENT SCREEN FOR ADDITIONAL ADULTS IN THE HOUSEHOLD

- Project Start Date
- Relationship to Head of Household
- In which county is the client currently located?

Living Situation at Time of Assessment

- Type of Residence
- Length of Stay in that Residence
- Length of Stay Less Than 7 Nights or Length of Stay Less Than 90 Days
- On the night before – stayed on the streets, ES, or Safe Haven
- Approximate date this episode 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” is selected, an additional question will appear asking for the total number over 12 months.

Disabling Conditions and Barriers

- Disabling Condition

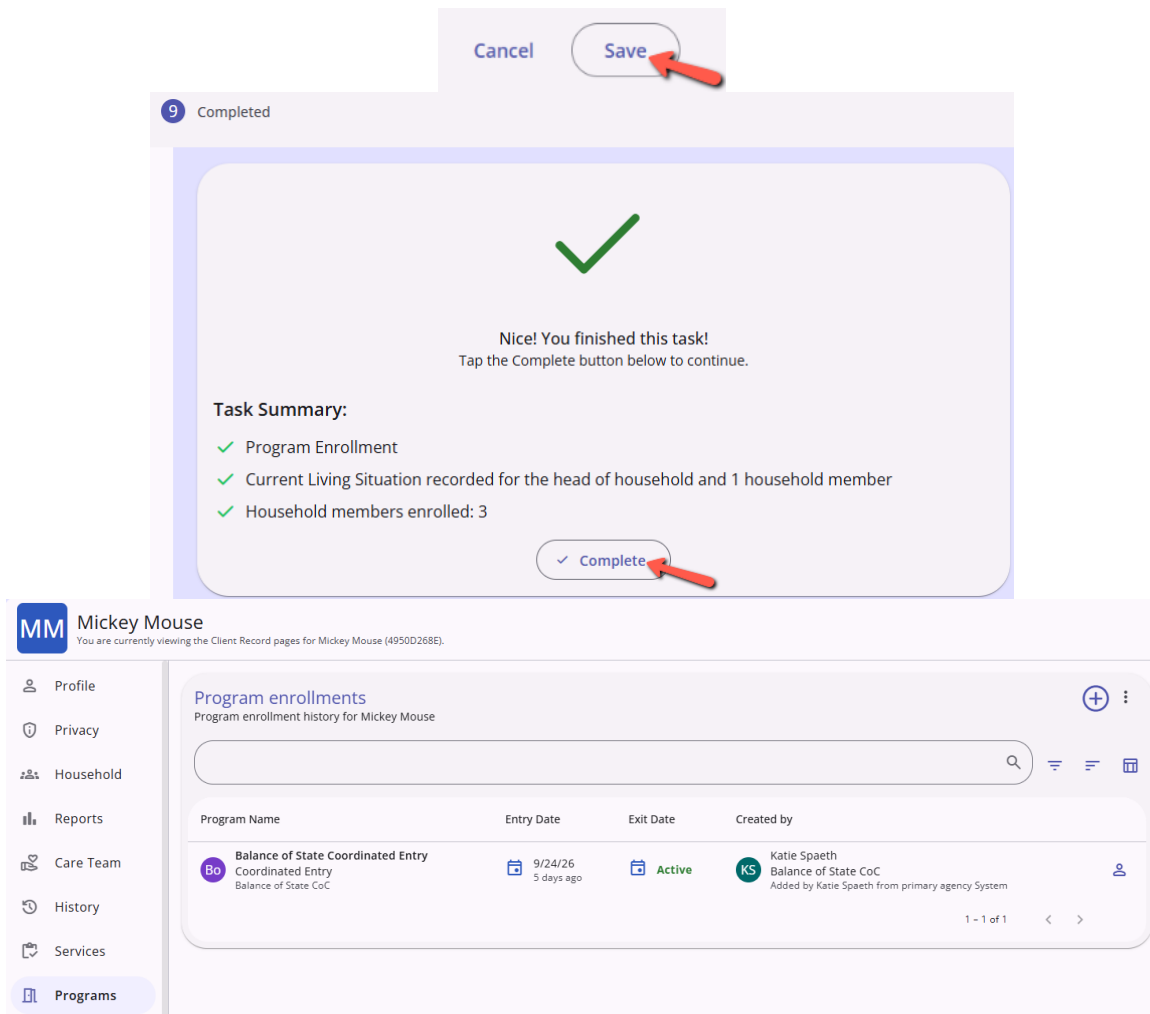
► ENROLLMENT SCREEN FOR CHILDREN IN THE HOUSEHOLD

- Project Start Date

- Relationship to Head of Household
- In which county is the client currently located?

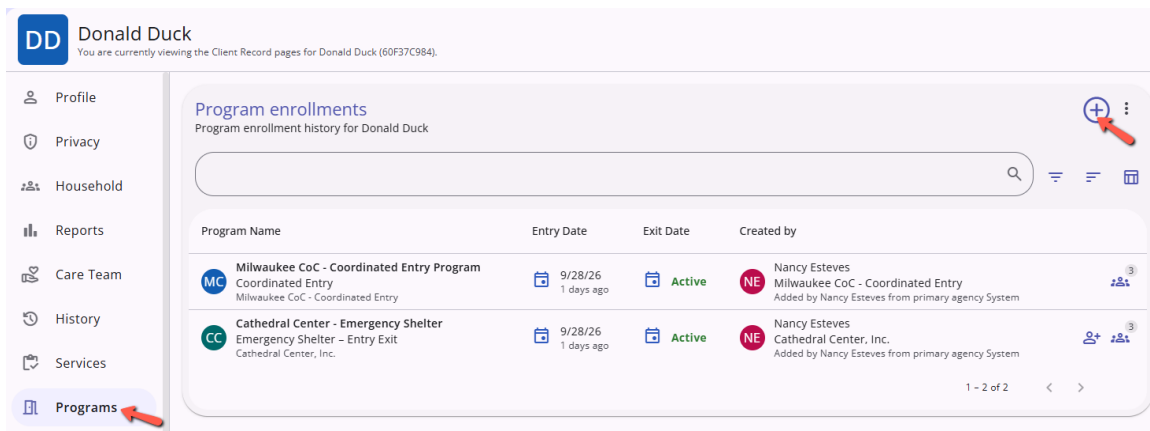
Disabling Conditions and Barriers

- Disabling Condition
- After entering all Enrollment information on the last household member's screen, click **Save**. The enrollment for the household is now created. Click **Complete**. The system will take you back to the **Programs** tab within the Head of Household's file.

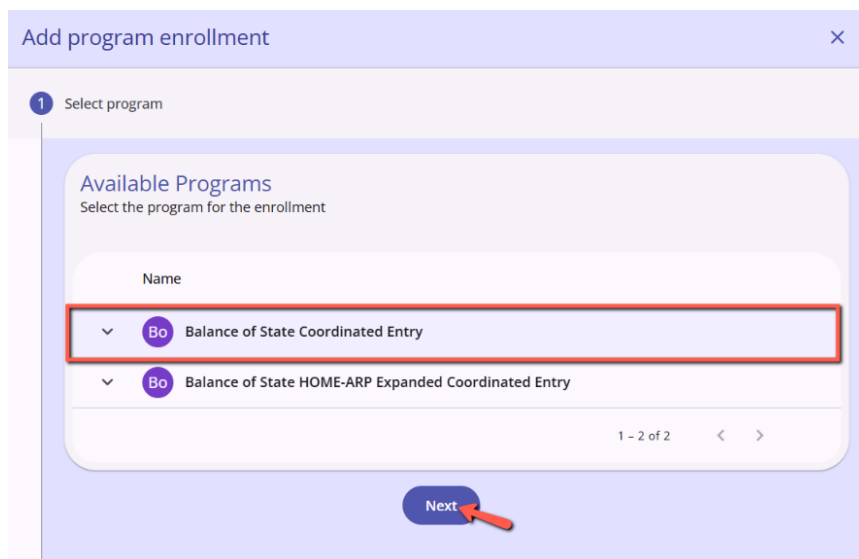


➤ Households without Children Who Want to Be Assessed Separately

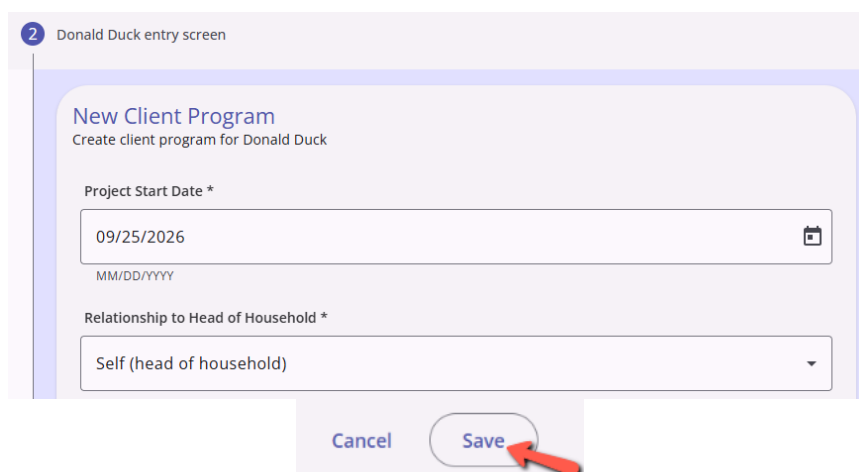
- Go to the client's file and navigate to the **Programs** tab on the left side of the screen. Click the plus icon and select the "Balance of State Coordinated Entry" program under the **Available Programs** heading.



- Once “Balance of State Coordinated Entry” is highlighted, click **Next**.



- This will lead to the Enrollment screen. Complete all fields on the screen and click **Save**. This will lead to the Current Living Situation.
 - For instructions on how to answer the questions on the Enrollment screen, see [Enrollment Screen for Head of Household](#) instructions.



- Complete the **Current Living Situation** for the client and click **Save**.
 - For instructions on how to answer the questions on the Current Living Situation, see [Current Living Situation](#) instructions.

3 Record Current Living Situation

Record Current Living Situation

Current Living Situation is required for this program at each client contact. Complete the initial assessment below.

Date of Contact *

09/25/2026

MM/DD/YYYY

Current Living Situation *

Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Ho...

Living Situation Verified By

Select option

Balance of State Coordinated Entry

Location Details

Save

- If there are other adults in the client's household, do **not** activate their toggle(s) to include them in the enrollment. Leave them untoggled and click **Next**.
 - After completing all steps for the first client, you will go to the additional household members' files and enroll them individually.

4 Include household members (optional)

Select members (optional)

You can select other household members below to add to the enrollment or just leave this empty and save to continue.

Household Members

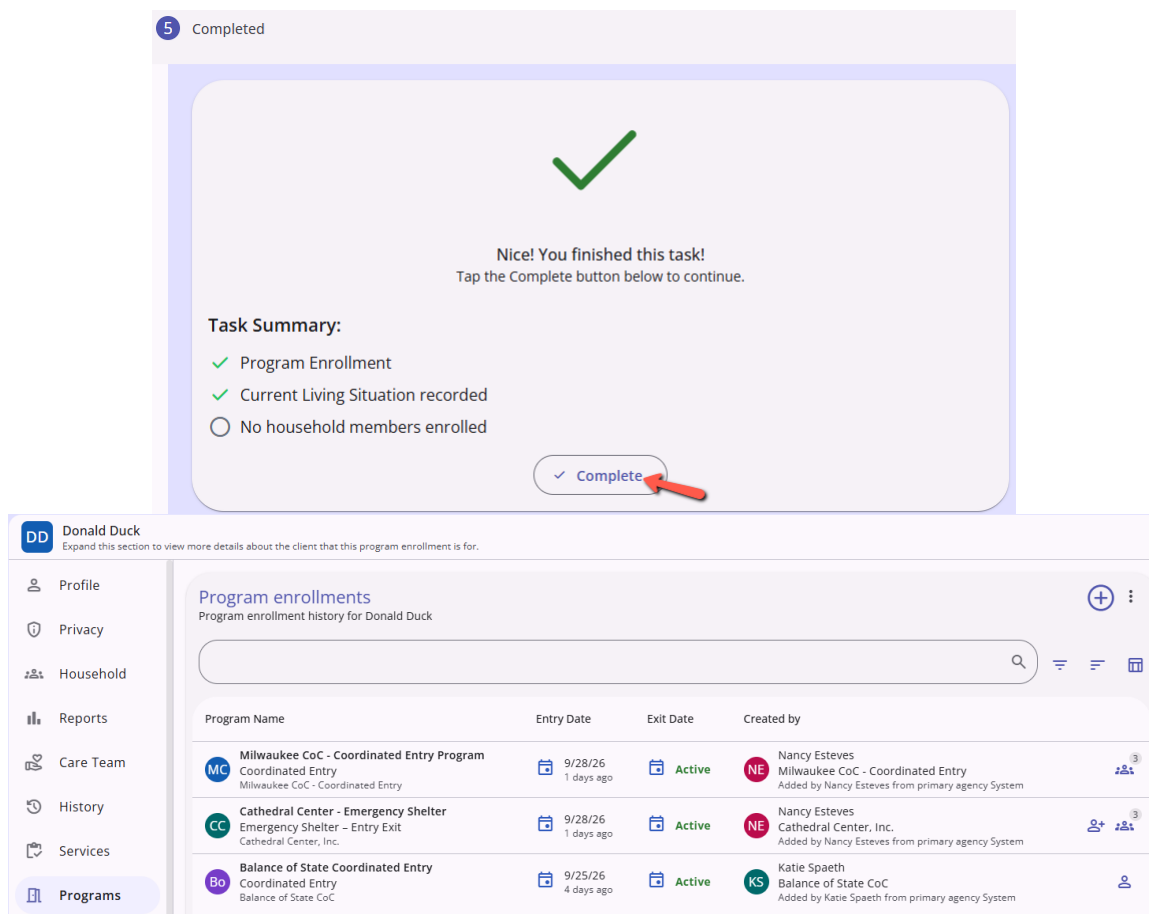
Donald Duck

Daisy Duck

Leave

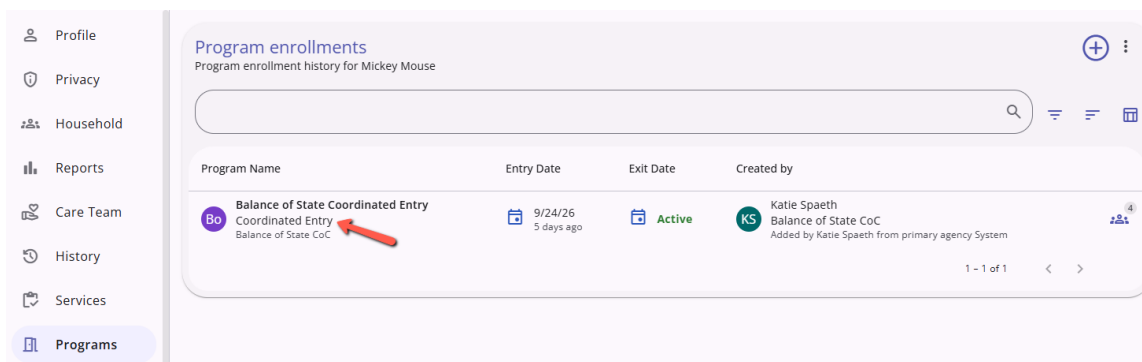
Back Next

- The enrollment for the client is now created. Click **Complete**. The system will take you back to the **Programs** tab within the client's file.



□ Step 2: Add Assessment - BoS Consent to Participate in Coordinated Entry

- Click on the the Balance of State Coordinated Entry enrollment.



- On the Assessments tab in the Head of Household's enrollment, click the **plus icon** and select the **BoS Consent to Participate in Coordinated Entry** assessment. Click **Next**.

Bo Balance of State Coordinated Entry
Balance of State CoC
Coordinated Entry

9/24/26 - Active
3 days ago

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

Program assessments
Balance of State Coordinated Entry assessment history for Mickey Mouse
Assessment due every month

Add a program assessment

1 Select an assessment

Available Assessments
Select an assessment to add to Balance of State Coordinated Entry

Name
CL Current Living Situation
SU Status Update Assessment
AA Annual Assessment
BB BoS Barriers Assessment
BC BoS Consent to Participate in Coordinated Entry
BP BoS Prevention Screen [V2]
BC Brown County Legal Services
CE Coordinated Entry Veteran Information - BoS

1 - 8 of 8

Next

- Complete the assessment questions, then click **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”*
 - Notes – *add a note if needed (notes are optional)*

2 Mickey Mouse assessment

Program Assessment: BoS Consent to Participate in Coordinated Entry

BoS Consent to Participate in Coordinated Entry data collection for Mickey Mouse

Assessment Date *

09/24/2026

MM/DD/YYYY

Does the client consent to participate in Coordinated Entry?

Yes

Notes

Cancel Save

- After saving the assessment, click **Complete** to return to the Assessments tab of the enrollment.

3 Completed

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

✓ Complete

□ Step 3: Add Assessment - BoS Barriers Assessment or BoS Prevention Screen

- Determine which assessment to complete with the household.

Which priority list is the household being referred to?	Which assessment should be completed?	How should the assessment be completed?
Balance of State CE Prevention Priority List	BoS Prevention Screen	For Households with Children – complete the assessment one time, under the Head of Household’s enrollment. For Households without Children – complete the assessment with each household member, under each person’s individual enrollment.
Balance of State CE Homeless Prioritization List – Households with Children	BoS Barriers Assessment	For Households with Children – complete the assessment one time,

		under the Head of Household's enrollment.
Balance of State CE Homeless Prioritization List – Households <u>without</u> Children	BoS Barriers Assessment	For Households without Children Who Want to Be Assessed Together – complete the assessment one time, under the Head of Household's enrollment. For Households without Children Who Want to Be Assessed Separately – complete the assessment with each household member, under each person's individual enrollment.

- On the **Assessments** tab in the enrollment, click the **plus icon** and select the appropriate assessment. Click **Next**.

The screenshot shows the 'Add a program assessment' dialog in the Balance of State Coordinated Entry system. The dialog has a title bar with a close button. Below the title bar, there is a step indicator '1 Select an assessment'. The main content area is titled 'Available Assessments' and contains a list of assessments. The 'BoS Barriers Assessment' (BB) and 'BoS Prevention Screen [V2]' (BP) are highlighted with red boxes. A red arrow points to the 'Next' button at the bottom right.

Balance of State Coordinated Entry
Balance of State CoC
Coordinated Entry

9/24/26 - Active
3 days ago

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

Program assessments
Balance of State Coordinated Entry assessment history for Mickey Mouse
Assessment due every month

Add a program assessment

1 Select an assessment

Available Assessments
Select an assessment to add to Balance of State Coordinated Entry

Name

- CL Current Living Situation
- SU Status Update Assessment
- AA Annual Assessment
- BB BoS Barriers Assessment**
- BC BoS Consent to Participate in Coordinated Entry
- BP BoS Prevention Screen [V2]**
- BC Brown County Legal Services
- CE Coordinated Entry Veteran Information - BoS

1 - 8 of 8

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*

2 Mickey Mouse assessment

Program Assessment: BoS Barriers Assessment
BoS Barriers Assessment data collection for Mickey Mouse

Assessment Date *
09/24/2026
MM/DD/YYYY

Agency Name
ICA Training Agency

Assessment Location *
Case manager office

Assessment Type *
In person

Assessment Level
Housing Needs Assessment

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

□ Step 4: Refer to the Community Queue

- On the **Referral** screen, change the **Referral Date** so it matches the date the client was assessed. Then click **Save**.

1 Mickey Mouse referral

Referral: Add to Community Queue
Referral for Mickey Mouse

Send to Queue(s)
BoS Housing

Referring Agency
Balance of State CoC

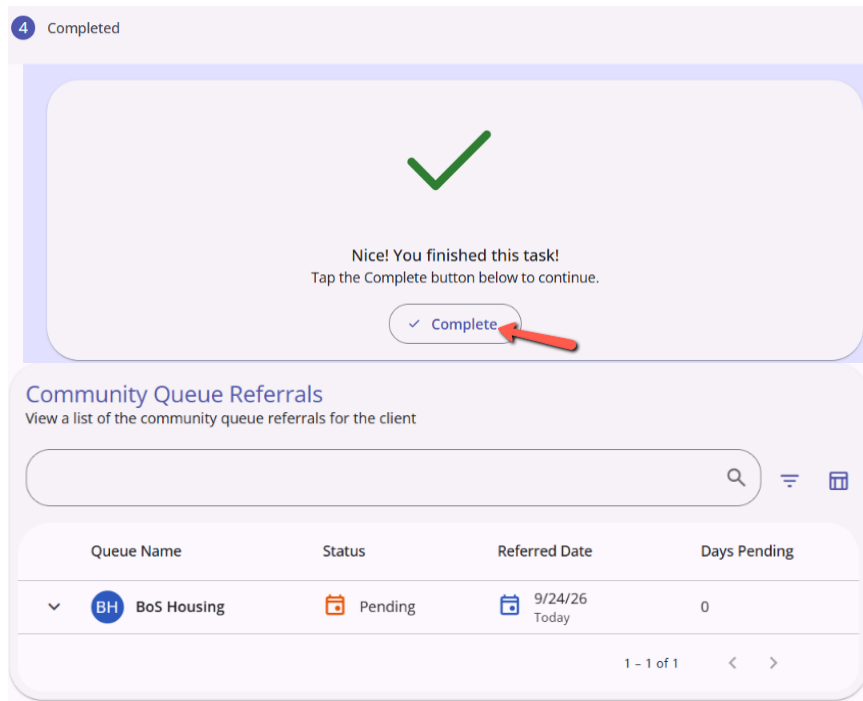
Referral Date
09/24/2026

8:39 AM

Note
Enter your note here...

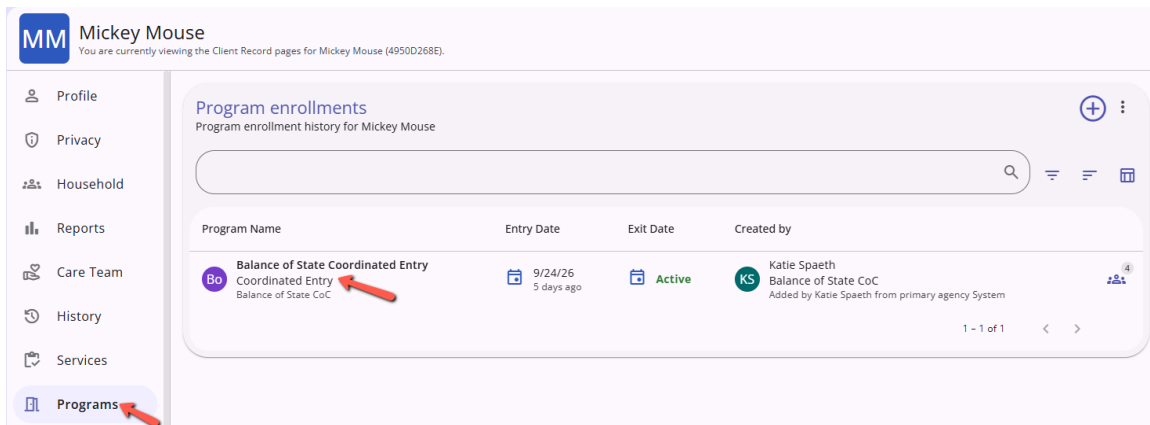
Cancel Save

- The Household is now referred to the Community Queue.

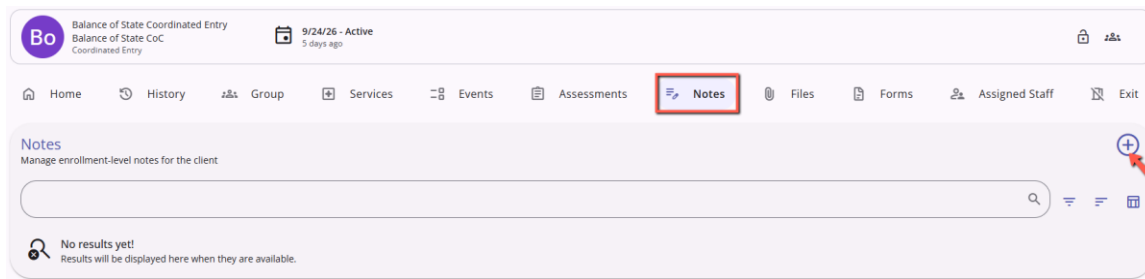


□ Step 5: Add a Note

- Add a note to the Head of Household's enrollment with any information relevant to their case.
 - * Important: In a Household without Children that consists of multiple adults, add a note to the client's enrollment indicating which other household members the client will be searching for housing with.
- Go to the client's file and click on the **Programs** tab. Then click on the **Balance of State Coordinated Entry** enrollment.



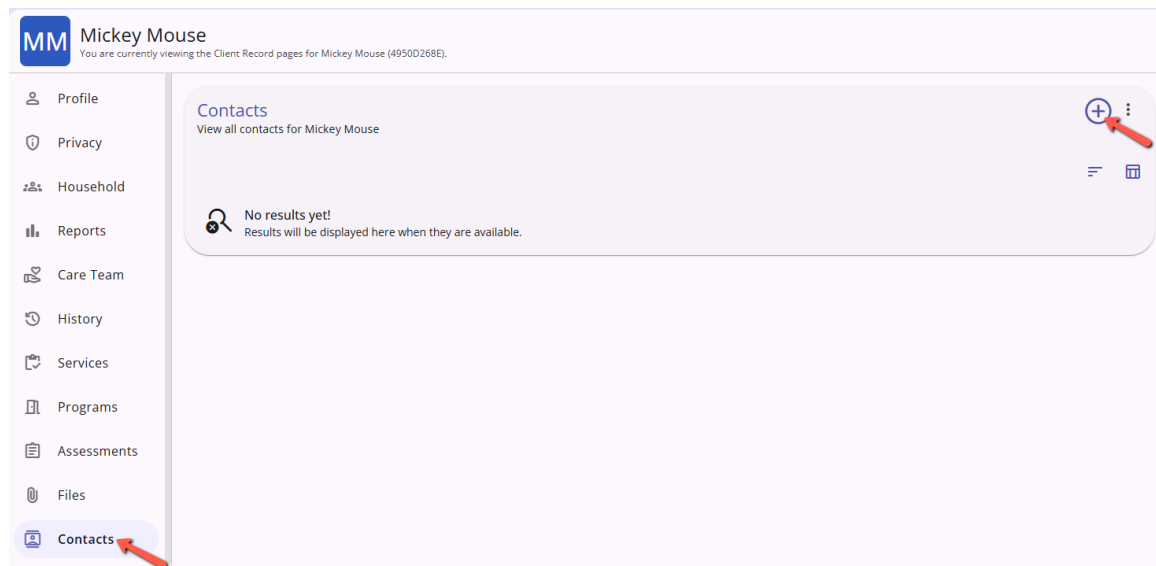
- Click on the **Notes** tab in the enrollment, then click the **plus icon** to add a note.



- Add a note indicating which other clients in Clarity are a part of the client’s household/any information relevant to their case, then click **Save** to save the note in the file.
 - * Title – *enter in a title for the note*
 - * Category – *select “Coordinated Entry” from the dropdown*
 - * Date – *input the date of the note*
 - * Hours and Minutes – *leave alone*

□ Step 6: Add Contact Information

- In the client’s file, click on the **Contacts** tab on the left side of the screen. Then click the **plus icon**.



- 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. Add notes as needed to clarify any contact information, then click **Save**.

A screenshot of a 'Add Contact' form. The form is titled 'Add Contact' and includes a sub-header 'Add a new contact for Mickey Mouse'. It contains several input fields: 'Contact Type *' with a dropdown menu showing 'Client'; 'Email' with the text 'mickey.mouse@disney.com'; 'Phone (#1)' with the text '123-456-7890'; and 'Phone (#2)' with the text '123-567-8910'. At the bottom, there is a toggle switch labeled 'Active Contact' which is currently turned on. The form is enclosed in a light blue border with a close button (X) in the top right corner.

Contact Date *

09/24/2026

MM/DD/YYYY

Note

Phone #2 is for client's friend Donald, can pass message along if client prioritizes for services.

POWERED BY CKEditor

Cancel 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

Add a new contact for Mickey Mouse

Contact Type *

Client

Email

katie@icatraining.org

Phone (#1)

123-321-5678

Phone (#2)

123-567-8910

Active Contact

Contact Date *

09/24/2026

MM/DD/YYYY

Note

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

POWERED BY CKEditor

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, click to edit the Contact record, inactivate the **Active Contact** toggle in the record, and click **Save**. Then add a new contact record with the client's current contact information.

☐ Households without Children Who Want to Be Assessed Separately: Repeat Steps 1 through 6

- For Households without Children who want to be assessed separately, each adult is individually enrolled, assessed, and referred to the Coordinated Entry System. If one of the household members prioritizes for services, they can “bring along” the other household members into programming with them.
- You have now enrolled the first client in a Household without Children who want to be assessed separately. If there are additional adults in the household, repeat Steps 1 through 6 to enroll, assess, and refer each additional adult in the household to the Coordinated Entry System.

COMPLETING FOLLOW UPS – HOUSEHOLD REMAINS ON THE LIST

The Balance of State CoC’s Coordinated Entry Policies and Procedures state that “Agencies making referrals to the Prioritization List will be responsible for following up with persons they refer in order to determine whether the individual or family is still in need of [housing assistance]. Follow-up contact must occur **every 30 days** at a minimum” while the household remains on the prioritization list.

There are two steps to documenting a follow-up in Clarity; all steps are completed within the Coordinated Entry program enrollment.

For Households with Children and Households without Children Assessed Together – these steps are completed under the Head of Household’s enrollment.

☐ Add a Note

Purpose of Notes:

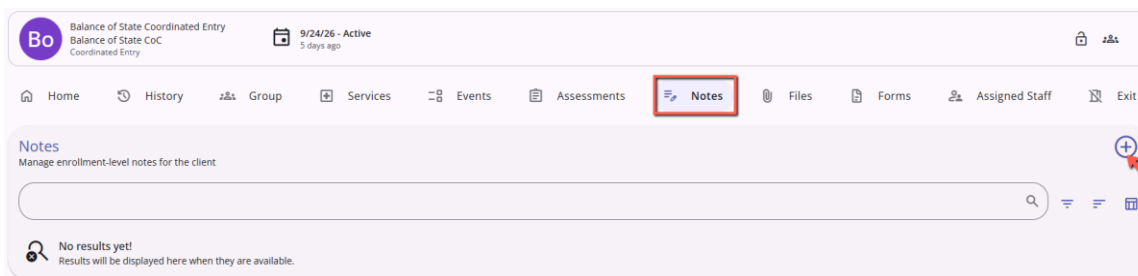
Notes are added within the program enrollment to document information relevant to the client / household's referral to the prioritization list.

Why is it important?

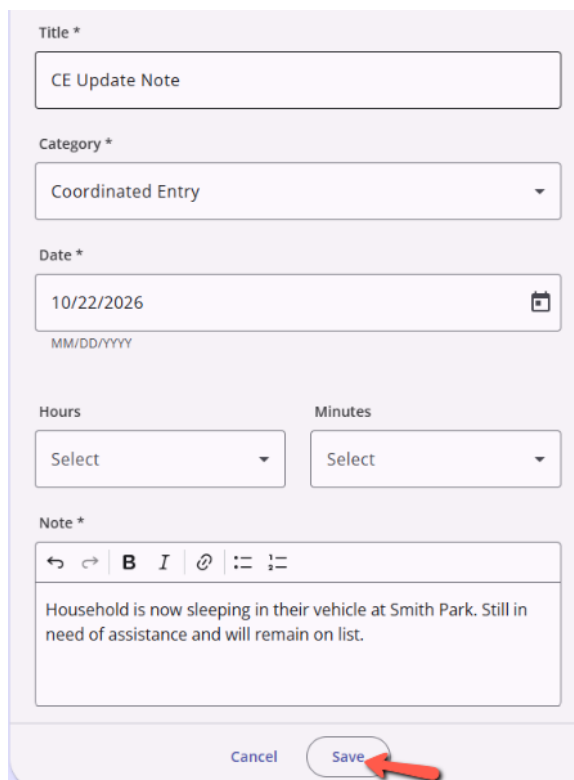
Notes provide a means of communication for CE participating agencies. They are used to document information pertinent to the client / household's referral and demonstrate in HMIS that follow-ups are being completed.

How do I add a Note?

- Within the program enrollment for the Head of Household, click on the **Notes** tab. Then click the **plus icon** to add a note.



- Complete all relevant information on the Note page, then click **Save** once complete.
 - Title – *add a title for your note*
 - Category – *select “Coordinated Entry”*
 - Date – *select the date on which you completed the update*
 - Hours and Minutes – *leave blank*



Title *

CE Update Note

Category *

Coordinated Entry

Date *

10/22/2026

MM/DD/YYYY

Hours

Select

Minutes

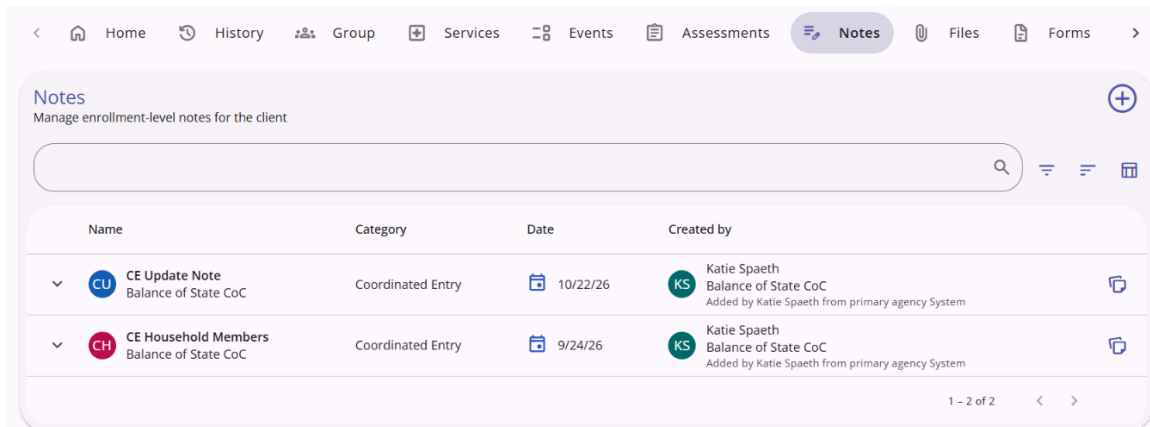
Select

Note *

Household is now sleeping in their vehicle at Smith Park. Still in need of assistance and will remain on list.

Cancel Save

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



☐ Add a Status Update Assessment

Purpose of the Status Update Assessment:

The Status Update Assessment is used to update a client's history of homelessness and chronic homeless status.

Why is it important?

It is used to update a household's homeless status, months & episodes of homelessness, and chronic homeless status. **This affects where the client lands on the prioritization list.**

How do I complete a Status Update Assessment?

- On the **Assessments** tab within the Head of Household's program enrollment, click the plus icon, and select **Status Update Assessment**. Click **Next**.

Program assessments
Balance of State Coordinated Entry assessment history for Donald Duck
Assessment due every month

SU Status Update Assessment

AA Annual Assessment

BB BoS Barriers Assessment

BC BoS CE Program Prioritization

BC BoS Consent to Participate in Coordinated Entry

BP BoS Prevention Screen [V2]

BC Brown County Legal Services

CE Coordinated Entry Veteran Information - BoS

1 - 9 of 9

Next

- If there are multiple Household Members, make sure each household member's name is selected. Click **Next**.

2 Include household members (optional)

Include additional group members (optional)
Select additional group members to add an assessment for (if applicable)

Household Members

✓ Minnie Mouse ✓ Morty Mouse ✓ Ferdie Mouse

Back Next

- Update the information on the Status Update Assessments to best reflect the household's current situation and chronicity status. Then click **Save** to complete the Status Update Assessment for additional household members, if applicable.

Program Assessment: Status Update Assessment
Status Update Assessment data collection for Mickey Mouse

Project Status Date *

10/30/2026 

MM/DD/YYYY

In which county is the client currently located? *

Rock ▼

Living Situation at Time of Update

Type of Residence * ⓘ

Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway ... ▼

Length of Stay in that Residence * ⓘ

One month or more, but less than 90 days ▼

Approximate date this episode of homelessness started * ⓘ

09/01/2026 

Times Homeless in the Past Three Years * ⓘ

One Time ▼

Total Months Homeless in the Past Three years * ⓘ

Two Months ▼

Survivor of Domestic Violence * ⓘ

No ▼

If a household has any housing-specific needs, please list below:

Special Housing Considerations ⓘ



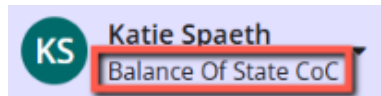
 **ADD A NOTE about your follow up!**

Cancel Save 

HOUSEHOLD PRIORITIZES FOR SERVICES – ADD A NOTE

☐ Add a Note to the Coordinated Entry Enrollment

- Switch into the **Balance of State CoC** agency.



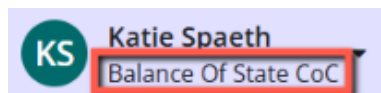
- Go to the Head of Household's **Balance of State Coordinated Entry** program enrollment. Add a note documenting the client has prioritized for a program at your agency.

HOUSEHOLD PRIORITIZES FOR SERVICES – ACCEPTED INTO PROGRAM

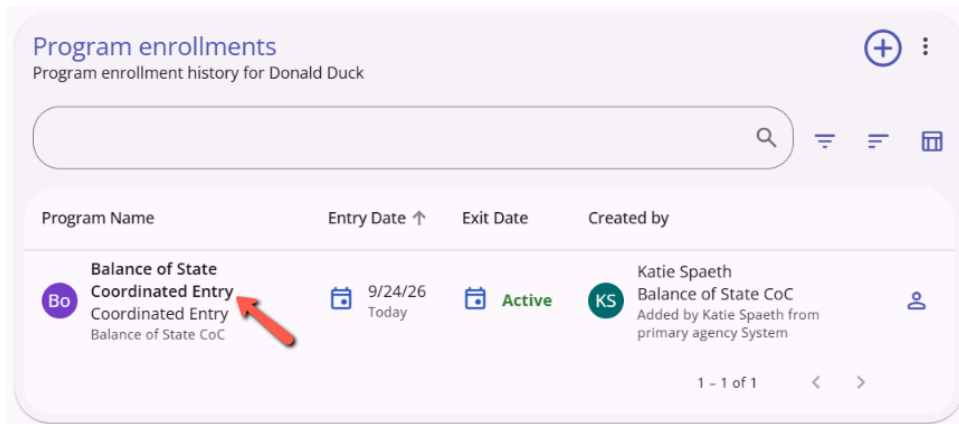
☐ Reassign the Coordinated Entry Enrollment

Once the client is found eligible for and accepts the program, the case manager who will be working with the client must reassign the client's Coordinated Entry enrollment to themselves. The case manager is responsible for managing the Coordinated Entry enrollment now that the client is in their program.

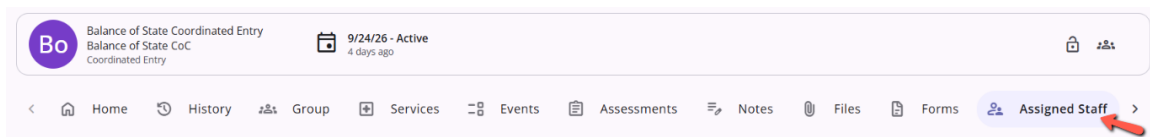
- Switch into the **Balance of State CoC** agency.



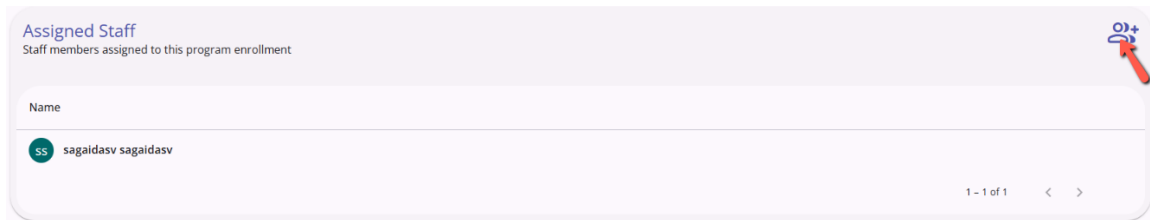
- Go to the client's file and click on the **Programs** tab. Then click on the **Balance of State Coordinated Entry** enrollment.



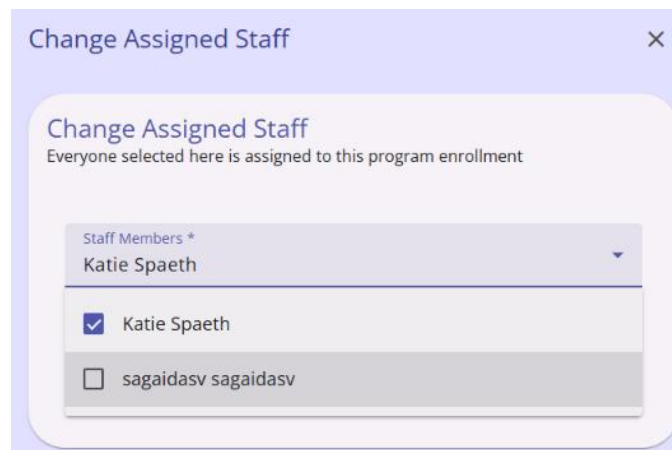
- Click the **Assigned Staff** tab.



- Click the **Change Assigned Staff** icon.



- Select your name, deselect the current Assigned Staff's name, and click **Save**.



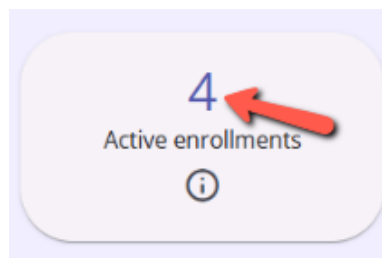
Change Assigned Staff X

Change Assigned Staff
Everyone selected here is assigned to this program enrollment

Staff Members *
Katie Spaeth

X Cancel Save

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



- From the home screen, 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.

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

Search [] Filter [] List []

Client	Program Name	Start Date	Created by
DD Duck, Donald 60F37C984	Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	9/24/26 4 days ago	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System
HR Hood, Robin BC5A547B9	Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	2/24/26 7 months 4 days ago	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System
MS McDuck, Scrooge 2A97823FB	Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	5/27/26 4 months 1 days ago	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System
MM Mouse, Mickey 4950D268E	Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	9/24/26 4 days ago	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System

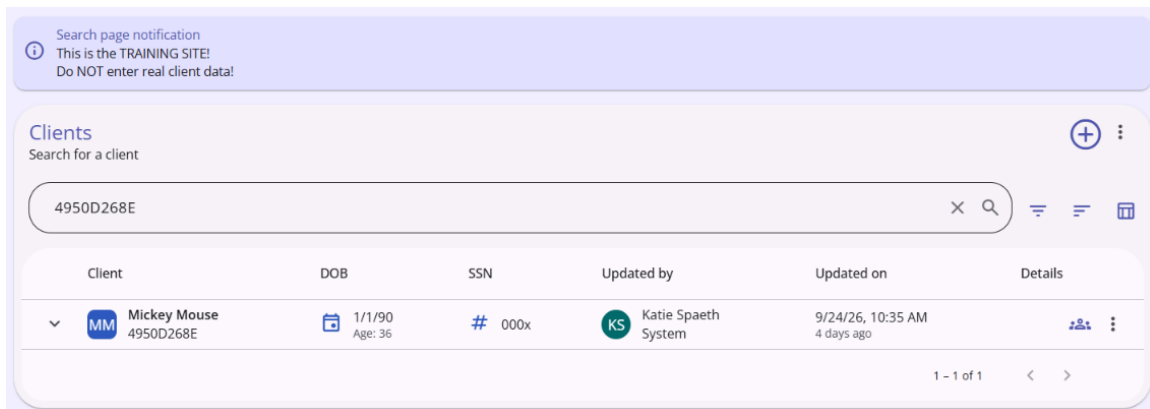
1 - 4 of 4 < >

□ Reassign the Referral

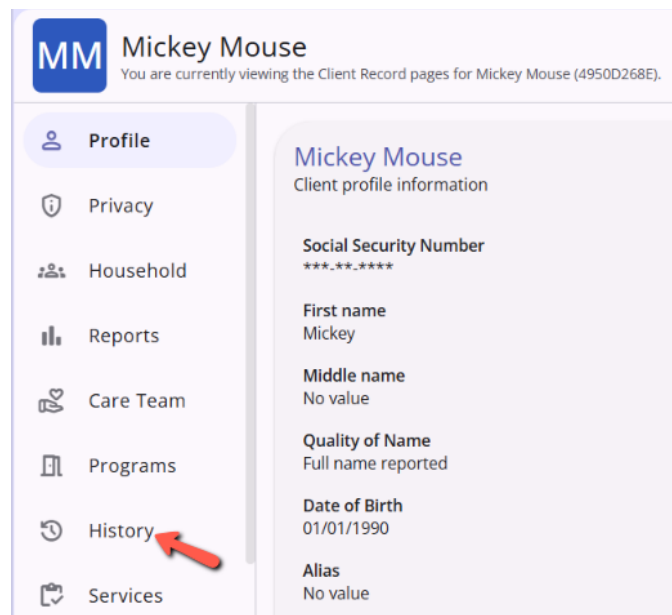
- Once the client is found eligible for and accepts the program, switch into the agency accepting the client (usually your primary agency).
 - You cannot be switched into the “Balance of State CoC” agency to complete this step.



- Use the Client Search to locate the head of household’s record (either by using their Unique Identifier or the client’s name).

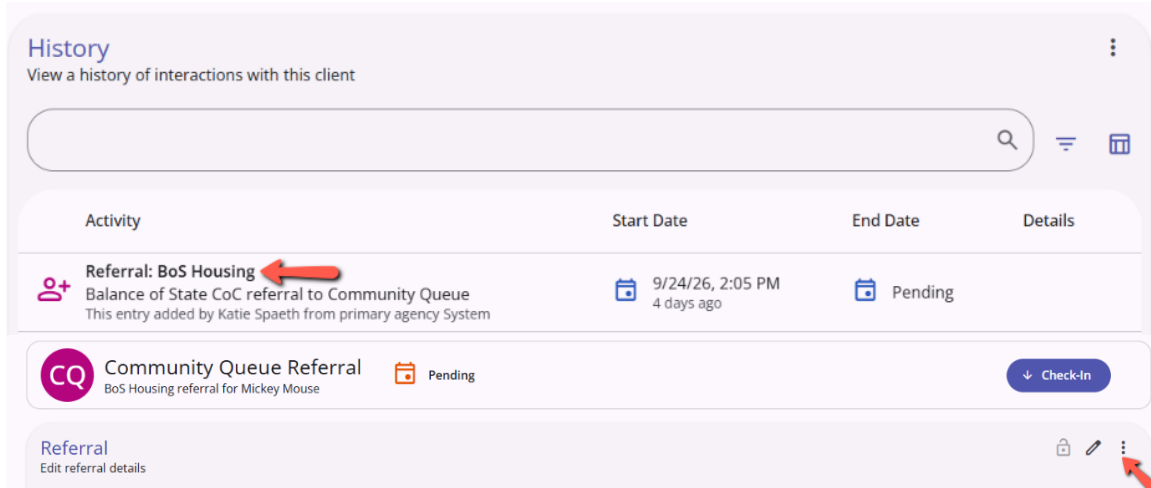


- Once you have located the client file, click on the client’s **History** tab.



- Locate the referral to Community Queue. Click on the referral. Then click the three dots on the right side of the screen and select **Reassign**.
 - Note – if the household is referred to both the Prevention List and the Homeless List, they will have 2 referrals. One for the BoS Prevention queue, and one for the BoS Housing queue.

- Be sure to edit the correct referral based on the program that is accepting the client:
 - **BoS Housing** – referral is reassigned to Transitional Housing, Rapid Re-Housing, Permanent Supportive Housing or Other Permanent Housing program types.
 - **BoS Prevention** – referral can be reassigned to Homelessness Prevention programs or Tenant Based Rental Assistance programs.

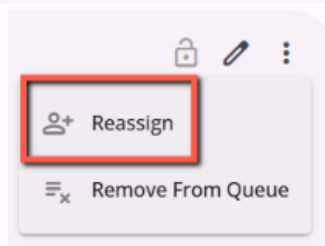


History
View a history of interactions with this client

Activity	Start Date	End Date	Details
 Referral: BoS Housing Balance of State CoC referral to Community Queue This entry added by Katie Spaeth from primary agency System	 9/24/26, 2:05 PM 4 days ago	 Pending	

Community Queue Referral
BoS Housing referral for Mickey Mouse  Pending [Check-In](#)

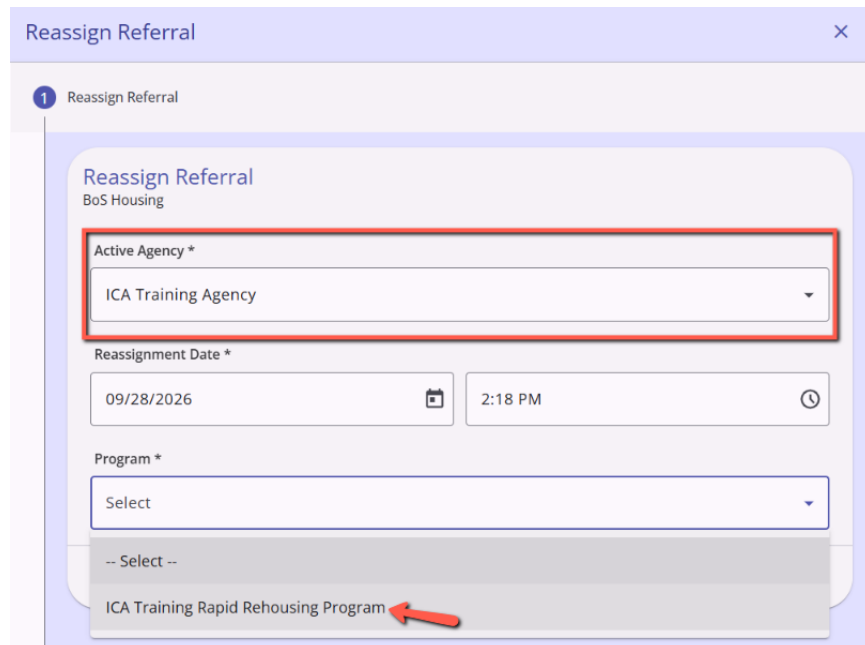
Referral
Edit referral details   



 **Reassign**

 Remove From Queue

- In the **Active Agency** dropdown, select your agency. Then you will see a list of your agency's programs. Select the program at your agency for which the client has prioritized, then click **Save**.



Reassign Referral ×

1 Reassign Referral

Reassign Referral
BoS Housing

Active Agency *
ICA Training Agency

Reassignment Date *
09/28/2026 2:18 PM

Program *
Select

-- Select --
ICA Training Rapid Rehousing Program

Program *

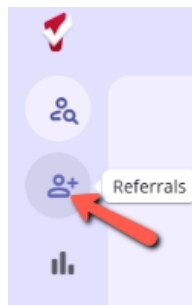
ICA Training Rapid Rehousing Program

Required Documents

- HMIS ROI: 1. HMIS Release of Information
- Pay Check Stub: 3. Finances and Income

Cancel Save

- This reassigns the referral from the Community Queue to your agency's program and is now considered **"Pending"** with your agency.
- To view a list of referrals that are currently pending with your agency, click on the **Referrals** tab on the left side of the screen.



- You will automatically land on the **Incoming Referrals** tab, which will show all referrals that have been re-assigned from the Community Queue to one of your agency's programs.

Referrals

Referrals for ICA Training Agency

Incoming Referrals

Community Queue

Outgoing Referrals

Availability

Snoozed

Incoming Referrals

View a list of the incoming referrals for ICA Training Agency

Referral Status: 2 selected

Client	Program	Referral Date	Days Pending
Mickey Mouse Referred by Balance of State CoC	ICA Training Rapid Rehousing Program ICA Training Agency	9/24/26 4 days ago	0 day

1 - 1 of 1

□ Create the Program Enrollment

- To enroll the household into the program, first be sure to switch into your primary agency.



- The point at which the program enrollment is created differs based on the program type.

Program Type	Point at Which Enrollment Is Created
Homelessness Prevention	Create the enrollment when the household is found eligible for and begins receiving services. The household may or may not be in permanent housing at this point in time.
Rapid Re-Housing, Permanent Supportive Housing, or Other Permanent Housing	Create the enrollment when the household is found eligible for and accepts the program.
Transitional Housing or Tenant Based Rental Assistance (TBRA)	Create the enrollment if and when the client moves into their unit. <i>Because the enrollment is created when the client moves into their unit, the referral will remain "Pending", without an end date, with your agency's program during the housing search process.</i>

➤ Households with Children and Households without Children Assessed Together

- Go to the Head of Household's file and navigate to the **Programs** tab. Click the plus icon, locate the program the client prioritized for, and click on it. Click **Next**.

The screenshot shows the Mickey Mouse client record interface. On the left, the 'Programs' tab is selected in the sidebar. The main area displays 'Program enrollments' for Mickey Mouse, with a table showing one enrollment: 'Balance of State Coordinated Entry' (ID: Bo), which is 'Active' and was created by Katie Spaeth. A red arrow points to a plus icon in the top right corner of the enrollments section.

Below this, the 'Add program enrollment' modal is open. It shows a list of 'Available Programs' for selection. The programs listed are:

- ICA Dane Street Outreach (ID)
- ICA DHS 1915i Test Program (ID)
- ICA Training Agency - CDGB-CV Rent & Utility Assistance (IT)
- ICA Training Agency - HOME ARP Supportive Services (IT)
- ICA Training Agency - Night by Night Shelter (IT)
- ICA Training BoS YHDP Test Program (IT)
- ICA Training Rapid Rehousing Program (IT)** - This program is highlighted with a red box. To its right, it says 'Pending Referral (Referral date: 9/24/2026)'.

- Activate the toggles for all household members to include them in the program enrollment. Click **Next**.

- Fill out the Enrollment screen for all household members and then click **Complete**.
- On the **Programs** tab, the program enrollment will be visible, and there will be a Referral icon indicating the Head of Household's referral was linked to the enrollment.
 - **NOTE:** The **Balance of State Coordinated Entry** program enrollment remains active at this time.

Program Name	Entry Date	Exit Date	Created by
ICA Training Rapid Rehousing Program PH – Rapid Re-Housing ICA Training Agency	9/28/26 Today	Active	Katie Spaeth ICA Training Agency Added by Katie Spaeth from primary agency System
Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	9/24/26 4 days ago	Active	Katie Spaeth Balance of State CoC Added by Katie Spaeth from System

- In the Head of Household's **History** tab, the referral will now have an end date that matches the household's enrollment into your agency's program. This indicates the referral is no longer active and has been accepted by your program.

History
View a history of interactions with this client

Type: 2 selected

Activity	Start Date	End Date	Details
ICA Training Rapid Rehousing Program ICA Training Agency This entry added by Katie Spaeth from primary agency Not Shared Agency	9/28/26 Today	Active	
Referral: ICA Training Rapid Rehousing Program Balance of State CoC referral to ICA Training Agency This entry added by Katie Spaeth from primary agency System	9/24/26, 2:05 PM 4 days ago	9/28/26, 12:00 AM Today	

➤ Households without Children

- Go to the Head of Household's file and navigate to the **Programs** tab. Click the plus icon, locate the program the client prioritized for, and click on it. Click **Next**.

DD Donald Duck
You are currently viewing the Client Record pages for Donald Duck (60F37C984).

Program enrollments
Program enrollment history for Donald Duck

Program Name	Entry Date	Exit Date	Created by
Milwaukee CoC - Coordinated Entry Program Coordinated Entry Milwaukee CoC - Coordinated Entry	9/28/26 Today	Active	Nancy Esteves Milwaukee CoC - Coordinated Entry Added by Nancy Esteves from primary agency System
Cathedral Center - Emergency Shelter Emergency Shelter - Entry Exit Cathedral Center, Inc.	9/28/26 Today	Active	Nancy Esteves Cathedral Center, Inc. Added by Nancy Esteves from primary agency System

Add program enrollment

1 Select program

Available Programs
Select the program for the enrollment

Name
ICA Dane Street Outreach
ICA DHS 1915i Test Program
ICA Training Agency - CDGB-CV Rent & Utility Assistance
ICA Training Agency - HOME ARP Supportive Services
ICA Training Agency - Night by Night Shelter
ICA Training BoS YHDP Test Program
ICA Training Rapid Rehousing Program

Pending Referral (Referral date: 9/24/2026)

- If there are additional adults in the household, activate their toggles to include them in the program enrollment. Click **Next**.

- Fill out the Enrollment screen for all household members and then click **Complete**.
- On the **Programs** tab, the program enrollment will be visible, and there will be a Referral icon indicating the client's referral was linked to the enrollment.
 - **NOTE:** The **Balance of State Coordinated Entry** program enrollment remains active at this time.

Program enrollments
Program enrollment history for Donald Duck

Program Name	Entry Date	Exit Date	Created by
ICA Training Rapid Rehousing Program PH – Rapid Re-Housing ICA Training Agency	9/29/26 Today	Active	Katie Spaeth ICA Training Agency Added by Katie Spaeth from primary agency System
Milwaukee CoC - Coordinated Entry Program Coordinated Entry Milwaukee CoC - Coordinated Entry	9/28/26 1 days ago	Active	Nancy Esteves Milwaukee CoC - CoC Added by Nancy Esteves from primary agency System
Cathedral Center - Emergency Shelter Emergency Shelter – Entry Exit Cathedral Center, Inc.	9/28/26 1 days ago	Active	Nancy Esteves Cathedral Center, Inc. Added by Nancy Esteves from primary agency System

Referral

ICA Training Rapid Rehousing Program

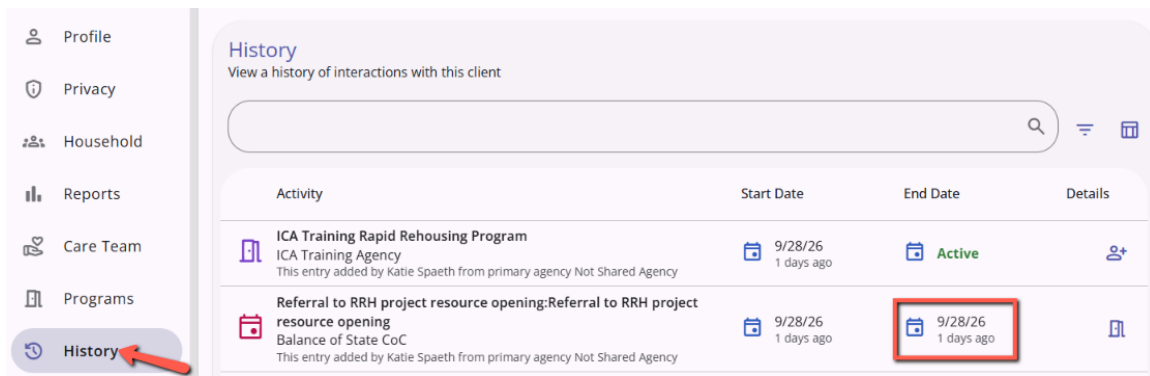
Referred program

Referral date: **9/24/26**

Sent by: **Balance of State CoC**
Katie Spaeth

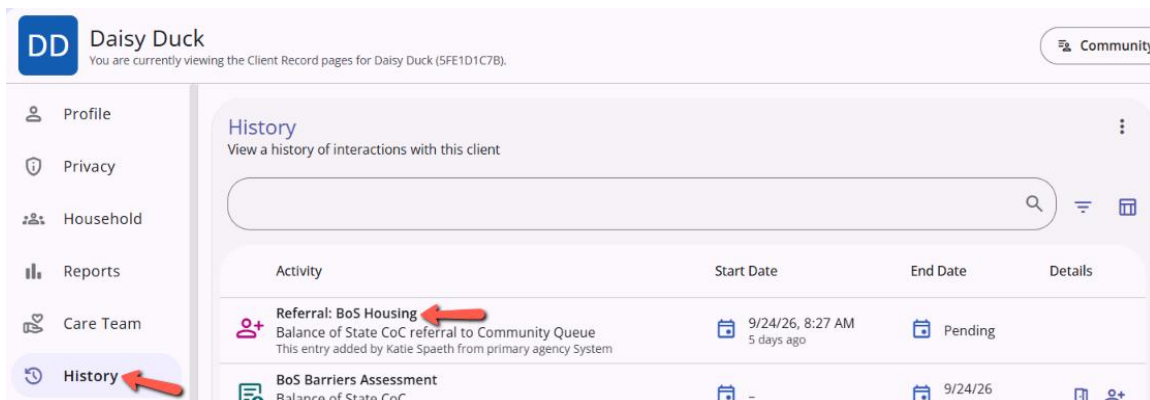
Status: **Completed**

- In the client's **History** tab, the referral will now have an end date that matches the client's enrollment into your agency's program. This indicates the referral is no longer active and has been accepted by your program.

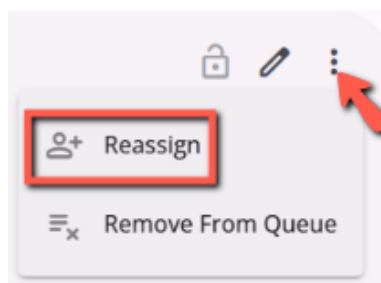


► FOR HOUSEHOLDS WIHTOUT CHILDREN ASSESSED SEPARATELY – CONNECT REFERRALS OF REMAINING HOUSEHOLD MEMBERS

- If the household consists of multiple adults, after creating the program enrollment, link the remaining household members' referrals to the newly created enrollment by following these steps:
- Go to the next household member's file and click on the **History** tab. Locate the referral to the queue and click on it.



- Click the three dots on the right side of the screen and select **Reassign**.



- Reassign the referral to the program in which the client was accepted. Click **Save**.

Reassign Referral

1 Reassign Referral

Reassign Referral
BoS Housing

Active Agency *

ICA Training Agency

Reassignment Date *

09/28/2026 8:32 AM

Program *

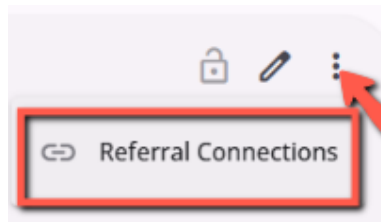
ICA Training Rapid Rehousing Program

Required Documents

- HMIS ROI: 1. HMIS Release of Information
- Pay Check Stub: 3. Finances and Income

Cancel Save

- After clicking **Save**, click the three dots on the right side of the screen again and select **Referral Connections**.



- Click the plus icon and select the program enrollment from the dropdown and click **Save**.

PR

Program Referral
Daisy Duck to ICA Training Rapid Rehousing Program

Referral Connections
View the referral connections for the referral

+

Select Program

ICA Training Rapid Rehousing Program (09/28/2026 - Acti...

× Cancel

Save

- The enrollment will now show in the **Referral Connections** section.

Referral Connections
View the referral connections for the referral

Program Name	Start Date	End Date	Type
ICA Training Rapid Rehousing Program PH – Rapid Re-Housing ICA Training Agency	9/28/26	Active	Group

1 – 1 of 1 < >

- In the client's **History** tab, the referral will now have an end date, and the client's referral will be linked to the program enrollment.

Profile

Privacy

Household

Reports

Care Team

Programs

History

History
View a history of interactions with this client

Activity	Start Date	End Date	Details
ICA Training Rapid Rehousing Program ICA Training Agency This entry added by Katie Spaeth from primary agency Not Shared Agency	9/28/26 1 days ago	Active	
Referral to RRH project resource opening:Referral to RRH project resource opening Balance of State CoC This entry added by Katie Spaeth from primary agency Not Shared Agency	9/28/26 1 days ago	9/28/26 1 days ago	

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Program enrollments
Program enrollment history for Daisy Duck

Program Name	Entry Date	Exit Date	Created by
ICA Training Rapid Rehousing Program PH - Rapid Re-Housing ICA Training Agency	9/28/26 1 days ago	Active	Katie Spaeth ICA Training Agency Added by Katie Spaeth from primary agency System
Milwaukee CoC - Coordinated Entry Program Coordinated Entry Milwaukee CoC - Coordinated Entry	9/28/26 1 days ago	Active	Nancy Esteves Milwaukee CoC - Coordinated Entry Added by Nancy Esteves from primary agency System
Cathedral Center - Emergency Shelter Emergency Shelter - Entry Exit Cathedral Center, Inc.	9/28/26 1 days ago	Active	Nancy Esteves Cathedral Center, Inc. Added by Nancy Esteves from primary agency System

Referral

ICA Training Rapid Rehousing Program

Referred program

Referral date: 9/24/26

Sent by: Balance of State CoC
Katie Spaeth

Status: **Completed**

□ Document the Household Moved into a Transitional Housing Unit or Permanent Housing

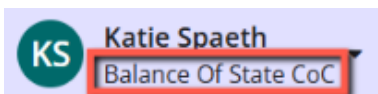
At this point, the household has been enrolled in your agency's program and their referral to the Community Queue has been accepted.

The Balance of State Coordinated Entry program enrollment is still active at this time. The household is exited from the enrollment when it is determined that they have moved into their transitional housing unit or permanent housing.

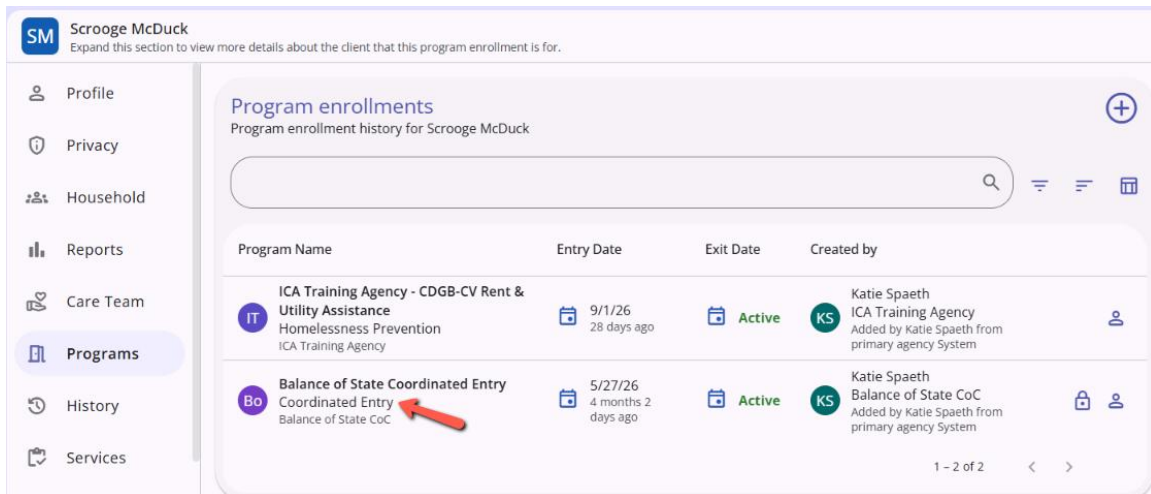
The process for exiting the household from their Balance of State Coordinated Entry program enrollment differs based on program type.

➤ Homelessness Prevention

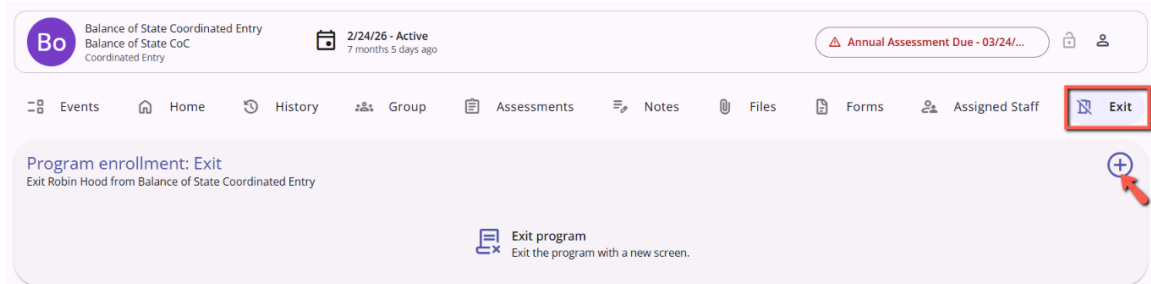
- Switch into the **Balance of State CoC** agency.



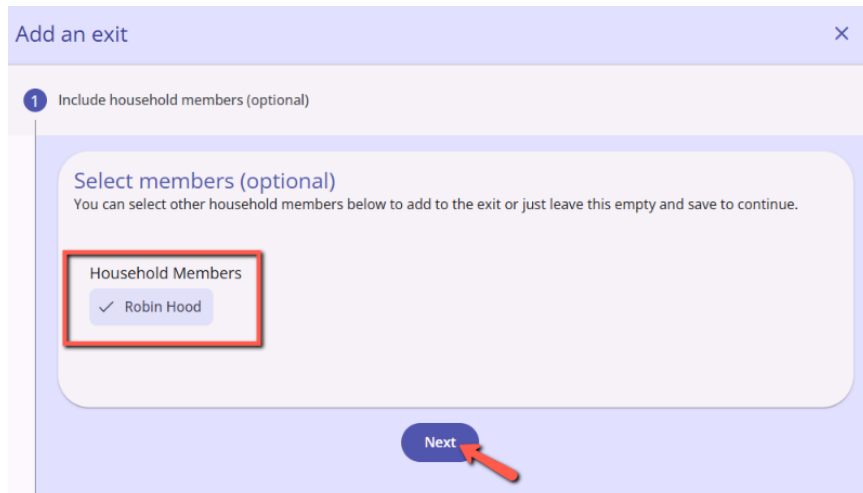
- Go to the Head of Household's file and click on the **Programs** tab. Locate the **Balance of State Coordinated Entry** program enrollment and click to edit.



- Click on the **Exit** tab in the enrollment and then click the plus icon.



- Select all household members, then click **Next**.



- Complete the Project Exit screen for each household member.

Add an exit

1 Include household members (optional)

2 Scrooge McDuck exit screen

Program enrollment: Exit

Exit data collection for Scrooge McDuck

Project Exit Date *

09/01/2026

MM/DD/YYYY

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 program

Save & Next

NOTE: Homelessness Prevention programs exit the household from their Balance of State Coordinated Entry enrollment once it is determined that the household is in permanent housing.

- * If the household is already in permanent housing when they prioritize (and you are working to keep them housed), the household will be exited from the Balance of State Coordinated Entry enrollment on the same date they are enrolled into your agency's Prevention program.

Program enrollments

Program enrollment history for Scrooge McDuck

Program Name	Entry Date	Exit Date	Created by
IT ICA Training Agency - CDGB-CV Rent & Utility Assistance Homelessness Prevention ICA Training Agency	9/1/26 28 days ago	Active	KS Katie Spaeth ICA Training Agency Added by Katie Spaeth from primary agency System
Bo Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	5/27/26 4 months 2 days ago	9/1/26 28 days ago	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System

1 - 2 of 2

- * If the household is not already in permanent housing when they prioritize for your program (and you are working to help them secure permanent housing), the household will be exited from the Balance of State Coordinated Entry program enrollment on the date they move into permanent housing.
 - Example: The household was enrolled into your agency's Prevention program on 9/1/2026 while living in a motel paid for by themselves. Your agency assists the household in securing a rental, into which the

household moves on 9/15/2026. The exit date on the Coordinated Entry enrollment will be 9/15/2026 (and will not match the Prevention program enrollment start date).

Program enrollments
Program enrollment history for Scrooge McDuck

Program Name	Entry Date	Exit Date	Created by
IT ICA Training Agency - CDGB-CV Rent & Utility Assistance Homelessness Prevention ICA Training Agency	9/1/26 28 days ago	Active	KS Katie Spaeth ICA Training Agency Added by Katie Spaeth from primary agency System
Bo Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	5/27/26 4 months 2 days ago	9/15/26 14 days ago	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System

1 - 2 of 2

➤ Transitional Housing or Tenant Based Rental Assistance (TBRA)

- Switch into the **Balance of State CoC** agency.



- Go to the Head of Household's file and click on the **Programs** tab. Locate the **Balance of State Coordinated Entry** program enrollment and click to edit.

Program enrollments
Program enrollment history for Robin Hood

Program Name	Entry Date	Exit Date	Created by
IT ICA Training Agency - TBRA Program Homelessness Prevention ICA Training Agency	9/1/26 28 days ago	Active	KS Katie Spaeth ICA Training Agency Added by Katie Spaeth from primary agency System
Bo Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	2/24/26 7 months 5 days ago	Active	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System

- Click on the **Exit** tab in the enrollment and then click the plus icon.

- Select all household members, then click **Next**. Complete the Project Exit Screen for each household member.

➤ Rapid Re-Housing, Permanent Supportive Housing, or Other Permanent Housing

- Switch into your primary agency (or the agency under which the client prioritized for assistance).



- 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.

Program enrollments
Program enrollment history for Goofy Goof

Program Name	Entry Date	Exit Date	Created by
 ICA Training Rapid Rehousing Program PH - Rapid Re-Housing ICA Training Agency	 9/10/26 19 days ago	 Active	 Katie Spaeth ICA Training Agency Added by Katie Spaeth from primary agency System
 Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	 9/1/26 28 days ago	 Active	 Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System

1 - 2 of 2

- Click on the **Edit** icon. Enter the date the household moved into their unit in the **Housing Move-In Date** field. Click **Save**.

ICA Training Rapid Rehousing Program
ICA Training Agency
PH - Rapid Re-Housing

9/10/26 - Active
19 days ago

Housing Move-In Date Needed

Home History Group Services Events Assessments Goals Notes Units/Beds Files

Edit Client Program
Update client program for Goofy Goof in ICA Training Rapid Rehousing Program

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

Housing Move-In Date

09/29/2026

MM/DD/YYYY

Cancel Save

- A message will appear that says “You entered data indicating that this individual client is within a permanent destination. As a result, this individual client will be exited from Coordinated Entry enrollments. You are advised to review other household member data including Head of Household status. Please confirm.” Click **Confirm**.

Warning

You entered data indicating that this individual client is within a permanent destination. As a result, this individual client will be exited from Coordinated Entry enrollments. You are advised to review other household member data including Head of Household status. Please confirm.

Cancel Confirm

- This will cause the household to automatically be exited from the **Balance of State Coordinated Entry** program enrollment on the date entered into the Housing Move-In Date field, to the appropriate destination.

Program enrollments
Program enrollment history for Goofy Goof

Search [] Filter [] []

Program Name	Entry Date	Exit Date	Created by
 ICA Training Rapid Rehousing Program PH – Rapid Re-Housing ICA Training Agency	 9/10/26 19 days ago	 Active	 Katie Spaeth ICA Training Agency Added by Katie Spaeth from primary agency System
 Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	 9/1/26 28 days ago	 9/29/26 Today	 Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System

1 – 2 of 2 < >

 Balance of State Coordinated Entry
Balance of State CoC
Coordinated Entry

9/1/26 - 9/29/26
Today

Events Home History Group Assessments Notes Files Forms Assigned Staff Exit

Program enrollment: Exit

Project Exit Date
09/29/2026

Destination
Rental by client, with ongoing housing subsidy

Rental Subsidy Type
RRH or equivalent subsidy

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

☐ Document the Household Did NOT Move into a Transitional Housing Unit or Permanent Housing

There are times when a household will not successfully move into a Transitional Housing unit or 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.

The process for documenting that a client did not secure housing differs based on program type.

➤ Homelessness Prevention, Rapid Re-Housing, Permanent Supportive Housing, or Other Permanent Housing

➤ EXIT THE HOUSEHOLD FROM THE PROGRAM ENROLLMENT

- Switch into your primary agency.



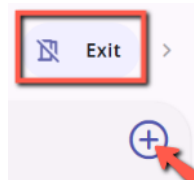
- Go into the Head of Household's file and click on the **Programs** tab. Then click to edit the program enrollment for the Rapid Re-Housing, Permanent Supportive Housing, or Other Permanent Housing program.

Program enrollments
Program enrollment history for Mickey Mouse

Program Name	Entry Date	Exit Date	Created by
 ICA Training Rapid Rehousing Program PH – Rapid Re-Housing ICA Training Agency	 9/28/26 1 days ago	 Active	 Katie Spaeth ICA Training Agency Added by Katie Spaeth from primary agency System
 Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	 9/24/26 5 days ago	 Active	 Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System

1 – 2 of 2

- Click on the **Exit** tab in the enrollment. Then click the plus icon.



- Select all household members, then click **Next**.

Add an exit

1 Include household members (optional)

Select members (optional)
You can select other household members below to add to the exit or just leave this empty and save to continue.

Household Members

☒ Minnie Mouse
 ☒ Morty Mouse
 ☒ Ferdie Mouse

Next

- Fill out the Project Exit Screen for all household members. Exit the household to the appropriate exit destination.

2 Mickey Mouse exit screen

Program enrollment: Exit

Exit data collection for Mickey Mouse

Project Exit Date *

09/29/2026

MM/DD/YYYY

Reason for Exit *

Housing not obtained - no housing move-in date

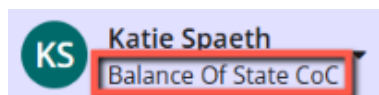
Destination *

Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Ho...

➡ ADD THE HOUSEHOLD BACK TO THE COMMUNITY QUEUE

If the household still needs assistance, add them back to the community queue.

- Switch into the **Balance of State CoC** agency.



- Return to the Head of Household's **Programs** tab and click to edit the **Balance of State Coordinated Entry** program enrollment.

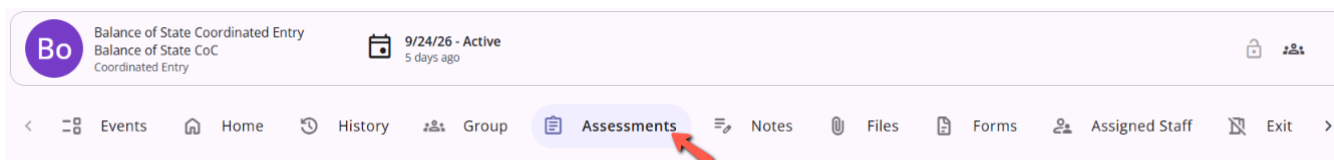
Program enrollments

Program enrollment history for Mickey Mouse

Program Name	Entry Date	Exit Date	Created by
ICA Training Rapid Rehousing Program PH - Rapid Re-Housing ICA Training Agency	9/28/26 1 days ago	9/29/26 Today	Katie Spaeth ICA Training Agency Added by Katie Spaeth from primary agency System
Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	9/24/26 5 days ago	Active	Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System

1 - 2 of 2

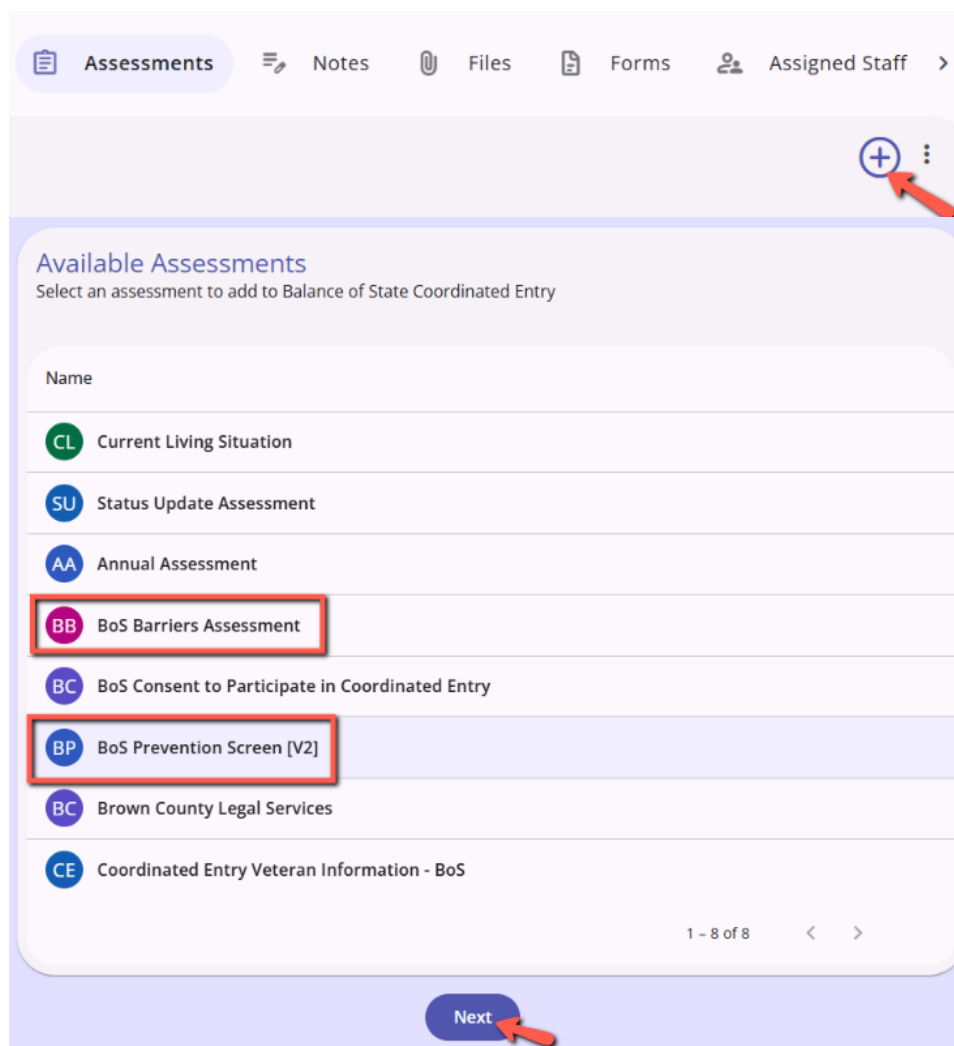
- Click on the **Assessments** tab in the enrollment to add the household back to the community queue.



- There are two options to add the client back to the community queue:

Option 1: Add a new assessment

- In the **Assessments** tab in the enrollment, click the plus icon to add a new assessment to the client's file (BoS Barriers Assessment or BoS Prevention Screen).



- Complete the assessment and follow the steps outlined in [Refer to the Community Queue](#).

Option 2: Use existing assessment

- Locate the most recent assessment, click the three dots on the right side of the screen, and click **View Eligibility**.

Program assessments
Balance of State Coordinated Entry assessment history for Mickey Mouse
Assessment due every month

Name	Completed	Score	Updated on
▼ Status Update Assessment Balance of State CoC	10/30/26 1 months 1 days from now		9/24/26, 2:50 PM 5 days ago
▼ Status Update Assessment Balance of State CoC	9/24/26 5 days ago		9/24/26, 2:47 PM 5 days ago
▼ Current Living Situation Balance of State CoC	9/24/26 5 days ago		9/24/26, 11:38 AM 5 days ago
▼ BoS Barriers Assessment Balance of State CoC	9/24/26 5 days ago		9/28/26, 2:05 PM 1 days ago

1 - 4 of 4

View Eligibility
Unlink From Program

- On the Assessments screen, click the plus icon next to Community Queue Referrals. Change the **Referral Date** so it matches the date the client was assessed. Then click **Save**.

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.

Add Community Queue Referral

1 Mickey Mouse referral

Referral: Add to Community Queue
Referral for Mickey Mouse

Send to Queue(s)
BoS Housing

Referring Agency
Balance of State CoC

Referral Date
09/24/2026 10:03 AM

Note
Enter your note here...

Cancel Save

➤ ADD A NOTE AND STATUS UPDATE ASSESSMENT

- Follow the instructions in “[Completing Follow Ups – Household Remains on List](#)” to add a note and Status Update Assessment.
 - Add a note indicating the household did not secure housing and is being added back to the list.
 - Add a Status Update Assessment to ensure the household’s chronic homeless status and length of time homeless is up to date.

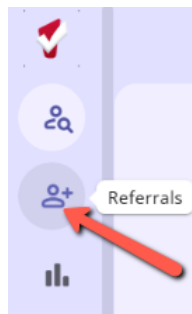
➤ Transitional Housing or Tenant Based Rental Assistance (TBRA)

➤ SEND THE PENDING REFERRAL BACK TO THE COMMUNITY QUEUE

- Switch into your primary agency.



- Click on the **Referrals** tab from the home screen.



- Locate the head of household’s referral and click on it. Then click the **Edit** icon.

Incoming Referrals
View a list of the incoming referrals for ICA Training Agency

Referral Status : 2 selected

Client	Program	Referral Date ↑	Days Pending
✓ RH Robin Hood Referred by Balance of State CoC	IT ICA Training - TBRA Program ICA Training Agency	2/24/26 7 months 5 days ago	211 days
✓ MM Mickey Mouse Referred by Balance of State CoC	IT ICA Training - TBRA Program ICA Training Agency	9/24/26 5 days ago	4 days

1 - 2 of 2

Program Referral
ICA Training Rapid Rehousing Program referral for Robin Hood

Pending

Check-In

View Client

Referral
Edit referral details

Edit

- Scroll down to Current Status. Change the **Current Status** from “Pending” to “Expired”.

Current Status *

Pending

Pending

Denied

Expired

Pending - In Process

- Complete the following fields, then click **Save**.
 - Denied by Type – Select “Provider”
 - Denied Reason – “Referral time expired”
 - Denial Information – enter a note explaining the circumstances.
 - Status Date – the date the referral expired
 - Send to Community Queue – select “Yes” if the household still needs assistance

Denied by Type *

Provider

Denied by Reason *

Referral time expired

Current Status *

Expired

Denied Information *

Client did not secure a unit in the allotted time. Adding back to the priority list.

Status Date *

09/29/2026

10:51 AM

Send to Community Queue *

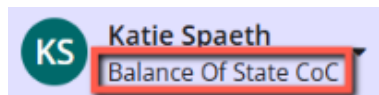
No Yes

Hide from customer portal

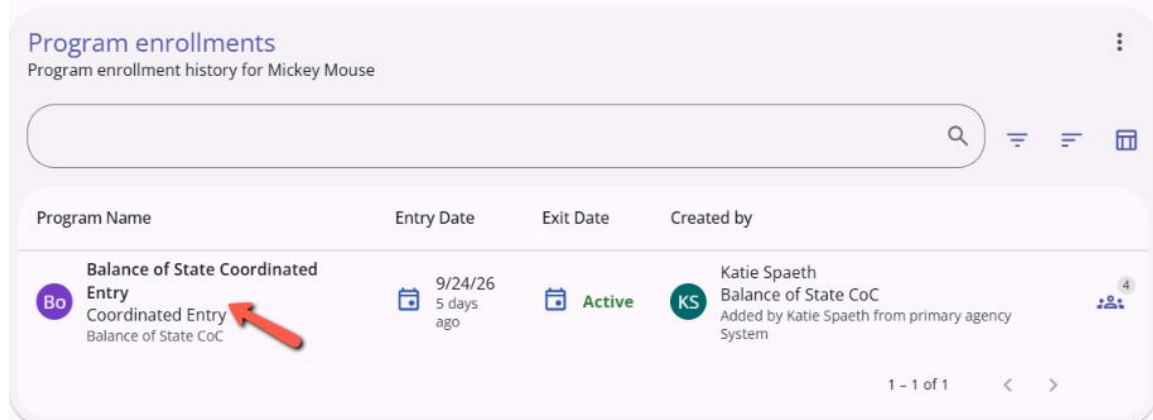
Cancel Save

ADD A NOTE AND STATUS UPDATE ASSESSMENT

- Switch into the **Balance of State CoC** agency.



- Go to the Head of Household's file and click on the **Programs** tab. Locate the **Balance of State Coordinated Entry** program enrollment and click to edit.



- Follow the instructions in [Completing Follow Ups – Household Remains on List](#) to add a note and Status Update Assessment.
 - Add a note indicating the household did not secure housing and is being added back to the list.
 - Add a Status Update Assessment to ensure the household's chronic homeless status and length of time homeless is up to date.

HOUSEHOLD PRIORITIZES FOR SERVICES – NOT ACCEPTED INTO PROGRAM

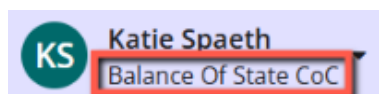
There may be times where a household prioritizes for services, and one of the following occurs:

- The household declines the services being offered.
- The household is found ineligible for the services being offered.
- The agency is unable to contact the household to offer the services for which they prioritized (3 unsuccessful attempts to contact).

Complete the steps below for these scenarios.

☐ Add a Note to the Coordinated Entry Enrollment

- Switch into the **Balance of State CoC** agency.



- Go to the Head of Household's file and click on the **Programs** tab. Locate the **Balance of State Coordinated Entry** program enrollment and click to edit.

Program enrollments			
Program enrollment history for Robin Hood			
🔍 ☰ ☰ 📅			
Program Name	Entry Date	Exit Date	Created by
Bo Balance of State Coordinated Entry Coordinated Entry Balance of State CoC 	📅 2/24/26 7 months 5 days ago	📅 Active	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System 👤

- Follow the instructions outlined in [Add a Note](#) to add a note into the enrollment, documenting the outcome of the client's prioritization.

Add Note

New Note

Add a note for Robin Hood

Title *

Prioritization - Unable to Contact Client

Category *

Coordinated Entry

Date *

09/29/2026

MM/DD/YYYY

Hours

Select

Minutes

Select

Note *

↶ ↷ B I @ ⋮ ⋮

Client prioritized for PSH program. Made 3 unsuccessful attempts to contact client and offer services. Removing from list.

POWERED BY CKEditor

Cancel

Save

❑ Exit Household from Coordinated Entry Enrollment (ONLY if unable to contact or household self-resolved)

- In the Head of Household's **Balance of State Coordinated Entry** enrollment, click on the **Exit** tab. Then click the plus icon. If there are multiple household members, include all household members in the exit.

Balance of State Coordinated Entry
Balance of State CoC
Coordinated Entry

2/24/26 - Active
7 months 5 days ago

Annual Assessment Due - 03/24/...

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

Program enrollment: Exit
Exit Robin Hood from Balance of State Coordinated Entry

Exit program
Exit the program with a new screen.

- Complete the Project Exit screen for all household members. Select the appropriate Project Exit Date and Destination (if unable to contact client, select **No Exit Interview Completed**).

Add an exit

1 Robin Hood exit screen

Program enrollment: Exit
Exit data collection for Robin Hood

Project Exit Date *

09/29/2026

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

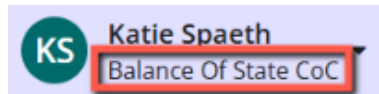
- If a Destination other than "Rental by client" or "Owned by client" is selected, the client will **not** be removed from the Community Queue. Follow the instructions outlined in [Remove the Referral from the Community Queue](#) to remove them from the queue.

COMPLETING FOLLOW UPS – HOUSEHOLD IS REMOVED FROM LIST (UNABLE TO CONTACT OR SELF-RESOLVED)

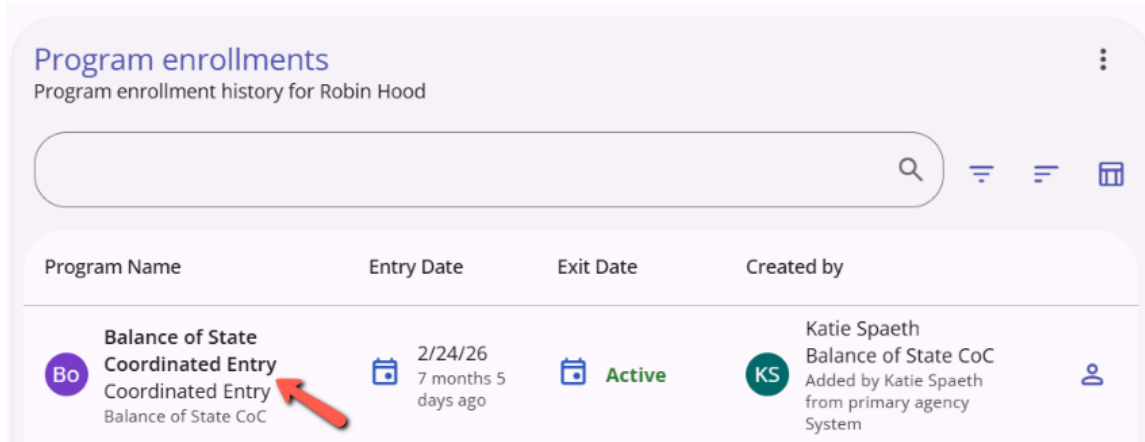
There are times when a household needs to be removed from the priority list (without prioritizing for services). Often this is because the agency is unable to contact the household during the follow-up process (ex: 3 unsuccessful attempts to contact were made), or the household has self-resolved.

□ Add a Note to the Coordinated Entry Enrollment

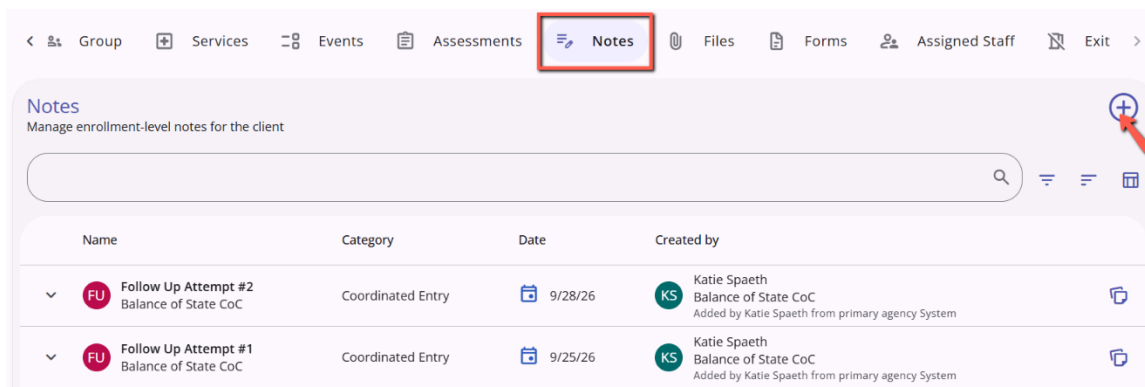
- Switch into the **Balance of State CoC** agency.



- Go to the Head of Household's file and click on the **Programs** tab. Locate the **Balance of State Coordinated Entry** program enrollment and click to edit.



- Click on the **Notes** tab in the enrollment and click the plus icon to add a note. Follow the instructions in [Add a Note](#) to add a note.
 - If unable to contact the client – document each unsuccessful attempt to contact the household.
 - If the household has self-resolved – add a note documenting the household's situation.



- Once at least 24 hours have passed since the 3rd attempt to contact was made, exit the household from the Coordinated Entry enrollment.

□ Exit the Household from the Coordinated Entry Enrollment

- In the Head of Household's **Balance of State Coordinated Entry** enrollment, click on the **Exit** tab. Then click the plus icon. If there are multiple household members, include all household members in the exit and click **Next**.

Add an exit [X]

1 Include household members (optional)

Select members (optional)
You can select other household members below to add to the exit or just leave this empty and save to continue.

Household Members

✓ Minnie Mouse ✓ Morty Mouse ✓ Ferdie Mouse

Next

- Complete the Project Exit screen for each household member. Select the appropriate exit date and destination.
 - If Unable to Contact – select **No exit interview completed** as the Destination.
 - If the household self-resolved – select the appropriate destination for where they exited to.

2 Mickey Mouse exit screen

Program enrollment: Exit
Exit data collection for Mickey Mouse

Project Exit Date *

09/29/2026 [Calendar Icon]

MM/DD/YYYY

Destination * ⓘ

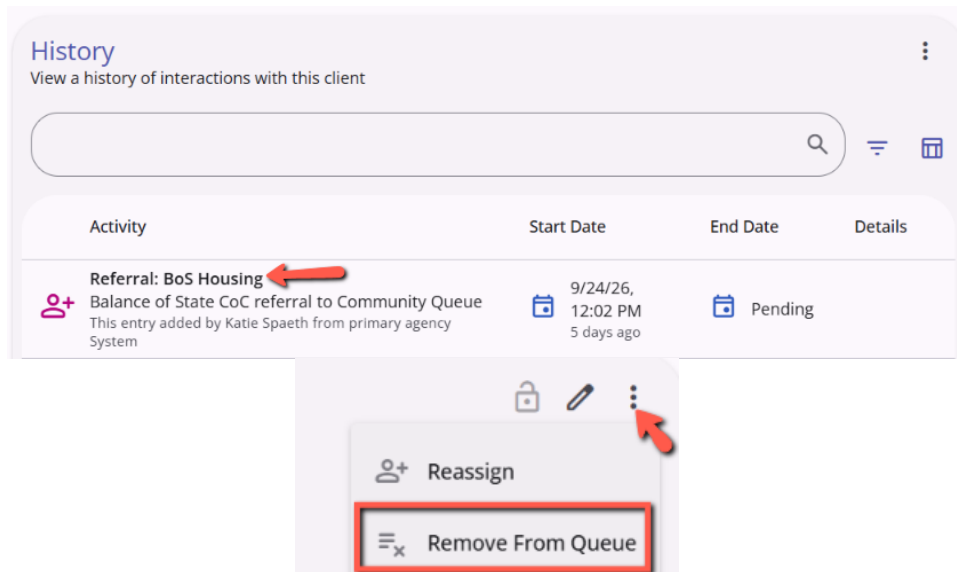
No exit interview completed ▼

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

Save & Next

□ Remove the Referral from the Community Queue

- After exiting the household from the Coordinated Entry enrollment, navigate to the **History** tab in the Head of Household's file. Locate the pending referral to the Community Queue and click to edit.



- Click the three dots on the right side of the screen and then click **Remove From Queue**. Enter the following information and click **Save**.

If Unable to Contact the Household:

- Reason for Removal – *Whereabouts Unknown*
 - Sub-reason – *Unable to Contact*
- Queue Removal Date – enter the date the household was removed from the priority list.

If the Household Self-Resolved

- Reason for Removal – *Self Resolved*
 - Sub-reason – *select the appropriate option*
- Queue Removal Date – enter the date the household was removed from the priority list.

Remove from Queue

Reason for Removal *

Self Resolved

Sub-reason for Removal *

Rental By Client

Queue Removal Date *

09/29/2026

12:04 PM

Cancel

Save

- In the Head of Household’s **History** tab, the referral will no longer show as pending and will now have an end-date.

History

View a history of interactions with this client

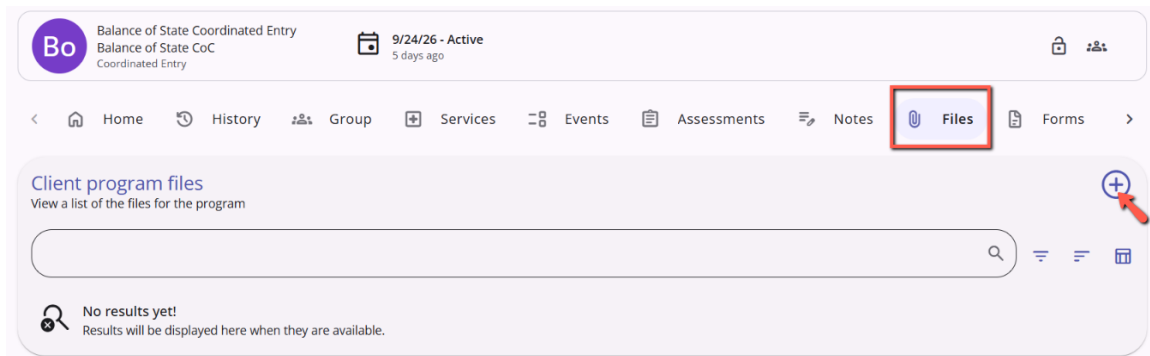
Activity	Start Date	End Date	Details
Referral: BoS Housing Balance of State CoC referral to Community Queue This entry added by Katie Spaeth from primary agency System	9/24/26, 12:02 PM 5 days ago	9/29/26, 12:04 PM Today	

ADDITIONAL INFORMATION

□ How to Upload Documents into the Coordinated Entry Enrollment

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

1. BoS Prescreen Form
 2. Client Rights & Responsibilities Form
- Within the Program Enrollment, click on the **Files** tab. Click the plus icon.



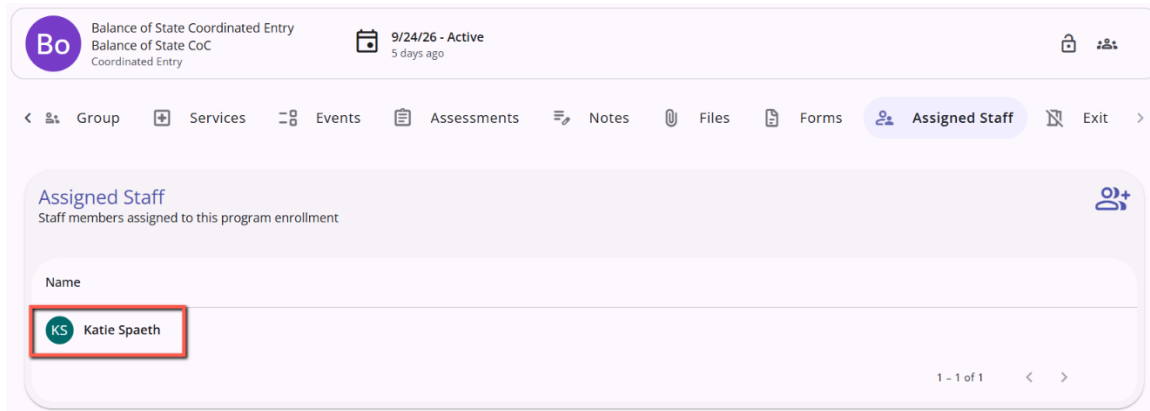
- Select the appropriate **Category** and **Name** for the file you are uploading, select the file from your computer to upload and click **Save**.

- Once uploaded, the file will appear in the Client Program Files.

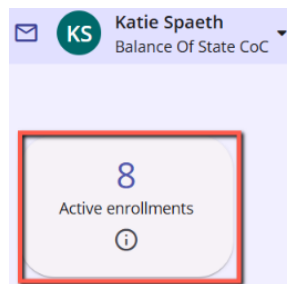
File	Uploaded Date	File Name	File Size	Preview
2. Coordinated Entry All CE paperwork Balance of State CoC	9/29/26 Today	BoSPrescreenForm.pdf	71.1 KB	

□ How to Keep Track of Your Coordinated Entry Enrollments / Referrals

- When you create the enrollment into the “Balance of State Coordinated Entry” program, you are automatically listed as the “Assigned Staff” in the enrollment dashboard.



- 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**, you land 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.

Active enrollments

Active client enrollments you have created or were assigned to

Client	Program Name	Start Date	Created by
DD Duck, Donald 60F37C984	Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	9/24/26 5 days ago	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System
DD Duck, Daisy 5FE1D1C7B	Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	9/24/26 5 days ago	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System
GG Goof, Goofy 4C51275A5	Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	9/1/26 28 days ago	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System
HR Hood, Robin BC5A547B9	Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	2/24/26 7 months 5 days ago	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System
MS McDuck, Scrooge 2A97823FB	Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	5/27/26 4 months 2 days ago	KS Katie Spaeth Balance of State CoC Added by Katie Spaeth from primary agency System

- The **Status Due** tab will provide information on households' enrollment start dates and the last date on which a status update was completed.
 - This tab can assist in tracking when clients are due for a 30-day follow-up.

KS Katie Spaeth

Balance Of State CoC

8

Active enrollments

3

Status due

Status due
Enrollments in your caseload for which annual assessments are required

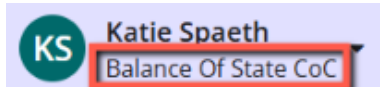
Client	Program Name	Start Date	Assessment Due
▼ HR Hood, Robin BC5A547B9	Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	2/24/26 7 months 5 days ago	3/24/26 6 months 5 days ago
▼ MS McDuck, Scrooge 2A97823FB	Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	5/27/26 4 months 2 days ago	6/27/26 3 months 2 days ago
▼ GG Goof, Goofy 4C51275A5	Balance of State Coordinated Entry Coordinated Entry Balance of State CoC	9/1/26 28 days ago	10/1/26 2 days from now

1 - 3 of 3

□ How to Document a Household that Declines to Participate in Coordinated Entry

If a household is offered the opportunity to participate in Coordinated Entry and they decline, document the effort to connect the household to Coordinated Entry through the following steps.

- Switch into the **Balance of State CoC** agency.



- Go to the Head of Household's file and navigate to the **Assessments** tab. Click the plus icon and select the **BoS Consent to Participate in Coordinated Entry** assessment. Click **Next**.

The screenshot shows the 'Goofy Goof' client record interface. On the left is a sidebar with navigation links: Profile, Privacy, Household, Reports, Care Team, History, Services, Programs, and Assessments (highlighted with a red box). The main area displays 'Client assessments' for 'Goofy Goof' with a search bar and a message: 'No results yet! Results will be displayed here when they are available.' Below this is a modal titled 'Add an assessment' with a close button (X). The modal has a step indicator '1 Select an assessment'. Under 'Available Assessments', there is a list of two options: 'BC BoS Consent to Participate in Coordinated Entry' (highlighted with a red box) and 'CE Coordinated Entry Veteran Information - BoS'. At the bottom of the modal is a 'Next' button (highlighted with a red arrow).

- Complete the questions on the screen and click **Save**.
 - Assessment Date – *the date the household was offered to complete a Coordinated Entry assessment and they declined.*
 - Does the client consent to participate in Coordinated Entry? – *select “No”*
 - Notes – *add any relevant notes*

2 Goofy Goof assessment

Program Assessment: BoS Consent to Participate in Coordinated Entry

BoS Consent to Participate in Coordinated Entry data collection for Goofy Goof

Assessment Date *

09/29/2026

MM/DD/YYYY

Does the client consent to participate in Coordinated Entry?

No

Notes

Staff provided information on the Coordinated Entry system and asked if the household is interested in participating. Household declined at this time.

Cancel Save

- The assessment will be visible in the **Client assessments** section of the **Assessments** tab, as well as the **History** tab. This is your agency's documentation of due diligence in offering Coordinated Entry services to clients served.

GG Goofy Goof

You are currently viewing the Client Record pages for Goofy Goof (4C51275A5).

Profile

Privacy

Household

Reports

Care Team

History

Services

Programs

Assessments

Client assessments

Assessment history for Goofy Goof

Name	Completed	Score	Updated on	Updated by
BC BoS Consent to Participate in Coordinated Entry Balance of State CoC	9/29/26 Today		9/29/26, 12:23 PM Today	KS Katie Spaeth System

1 - 1 of 1

GG Goofy Goof

You are currently viewing the Client Record pages for Goofy Goof (4C51275A5).

Profile

Privacy

Household

Reports

Care Team

History

History

View a history of interactions with this client

Activity	Start Date	End Date	Details
BoS Consent to Participate in Coordinated Entry Balance of State CoC This entry added by Katie Spaeth from primary agency System	-	9/29/26 Today	