

## Common Mistakes and Needed Reminders for Coordinated Entry

### The Referral

- Make sure to attach the VI SPDAT to the referral
- Make sure to attach the correct VI SPDAT to the referral.
- Make sure the referral is to the Correct List
- Multiple referrals to multiple lists, need to be separate referrals
- Do not add kids to the Referral List, only the Head of Household or adult with the disability
- Remember to add yourself to the Follow up
- If a shelter makes the referral and the client exits shelter to permanent housing, the shelter needs to close out the referral

### The Coordinated Entry Assessment

- Do not end date someone else's Yes record for disability
- Double checking the CE assessment questions when you do a follow up in case another agency changed it since they were in your program or you met with them
- Update the CE Assessment when you complete a follow up with the client
- Make sure to update the number of months/times homeless if it has changed since last speaking with the client
- Did you need to do a new VI SPDAT, has there been new information provided that would potentially change the score.
  - If a new VI SPDAT is completed, change it out on the original referral

### Adding a Service

- Don't put a service on the referral, if didn't provide the service or house the client,
  - Contact your HMIS Coordinator if you put a service on the referral and it needs to be removed
- Add a Service to the Referral if you are housing the client

### New Follow-Up Workflow

- Add a Follow-up to the Coordinated Entry Follow-up sub-assessment when follow up with client referrals.
- Need notes are now just notes about the client's housing need, like "needs first floor apartment," "client only wants to live in the city of Oconto because he doesn't have transportation"