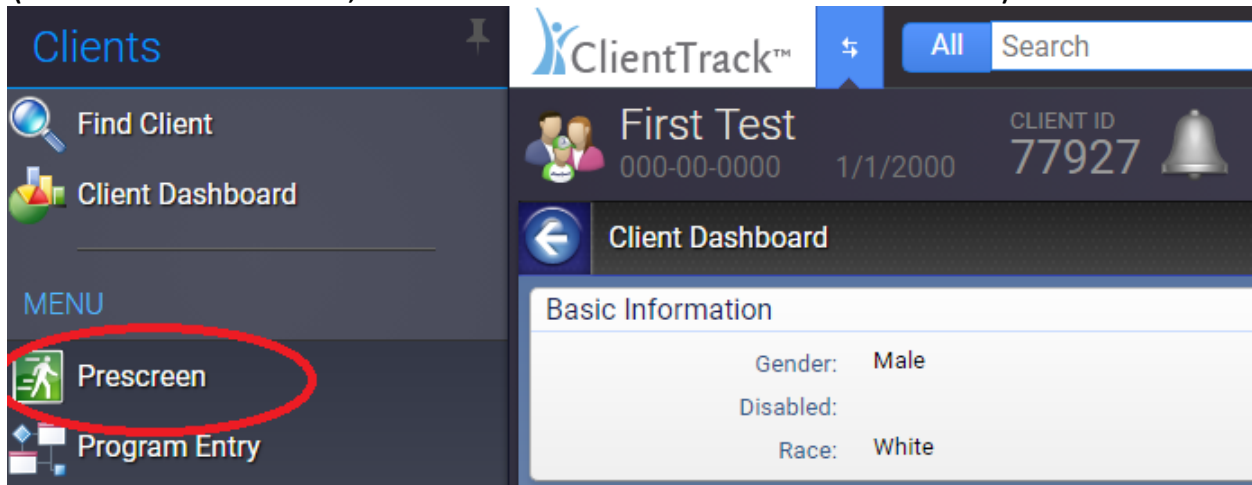


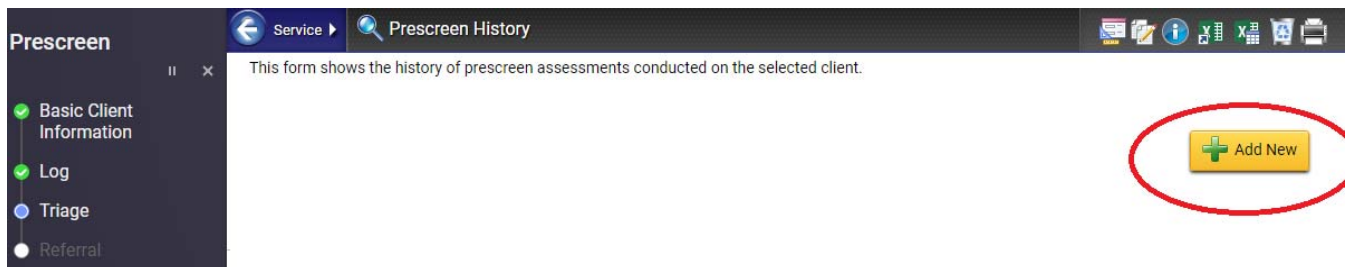
COORDINATED ENTRY SYSTEM IN CLIENTTRACK

1. SELECT THE PRESCREEN BUTTON ON THE LEFT PANEL

(IF YOU DO NOT HAVE ACCESS, PLEASE CONTACT THE HELP DESK AT 772-567-7790 X 1020)



2. CHOOSE THE CURRENT CLIENT OR CREATE A NEW CLIENT
3. UPDATE/ENTER BASIC INFORMATION, INCLUDING TELEPHONE AND CITY/STATE/ZIP CODE
4. ALL ENTRIES ARE LOGGED IN AS A SERVICE – COORDINATED ENTRY (PHONE CALL TIME LOG)
5. CLICK SAVE
6. UNDER TRIAGE, CHOOSE “ADD NEW”



7. MAKE SURE THAT THE PRESCREEN IS COMPLETED FULLY, INCLUDING TELEPHONE AND EMAIL ADDRESS. IF IT DOESN'T APPLY, LEAVE BLANK (IE: IF THE CLIENT IS HOMELESS, THEIR RENT AMOUNT IS UNKNOWN).



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8. FOR INCOME INFORMATION, PLACE THE ANNUAL AMOUNT IN THE COMMENT BOX AND CALCULATE AMI UTILIZING THE 2021 AREA MEDIAN INCOME TABLES HERE.


Ask each questions as they appear and answer them while on the phone with the caller. The score breakdown will appear on the bottom of the form.

9. CLICK SAVE – THE NEXT SCREEN WILL SHOW THE PRESCREEN SCORE


10. CLICK FINISH


11. THE NEXT SCREEN WILL ALLOW YOU TO REFER IN/TURNAWAY THE CLIENT OR REFER OUT


Referring In means that the client is eligible for assistance.



Referral Date: * 


Referred For:

To Provider: * 


From Provider: 


Outcome: * 

Appointment Date:   AM

Refer To User: 

Email User:

Result: 

Restriction: * Restrict to Organization 
 Restrict to User
 Restrict to MOU/Info Release

Select Refer to User by Name and then select Email User. An email box will appear once you hit save.



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Referring Out means that the client is ineligible for assistance or would be best served by another agency.

Common Referrals	
Emergency Shelter	Hope for Families Center/Compassion House
HP Clients over 30% AMI, RR clients scoring below 22, HP clients scoring below 15	Other rental programs
Mental Health/Chronically Homeless	New Horizons - Jennifer Bresnahan
Single Women	TCHSC – Pam Keen for Naomi’s House
Veterans	TCHSC – Ayisha for SSVF

The Referring Out will open up an email document and you can send an email from the Clienttrack system. The email will show up with the client ID, not the full prescreen.