Created March 30, 2018

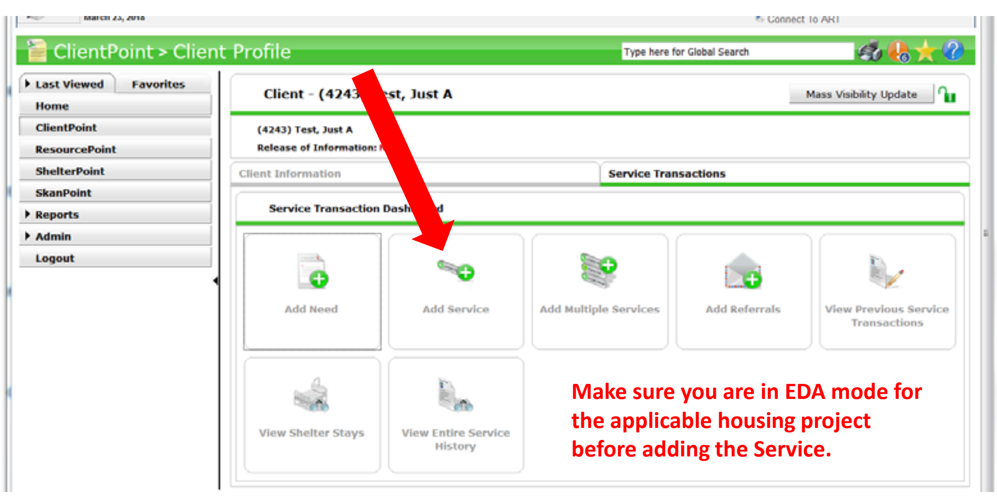
HRCS Coordinated Entry
By Name List: Pending Housing & Exit Workflow

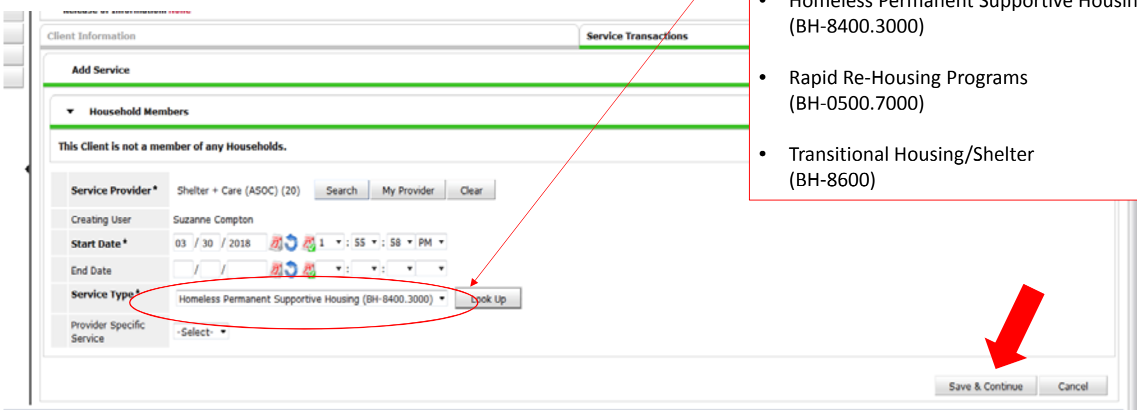
Follow the attached workflow for steps to take when:

- ✓ Starting to actively work with a client on the By Name List for a possible RRH, TH, or PSH opening;
- ✓ Client above is not accepted for the housing opening (for any reason) and needs to stay on the By Name List; OR
- ✓ Client/person needs to be exited from Coordinated Entry (removed from By Name List) because they are now permanently housed or for other reasons (such as moving out of county).

Steps to take by Provider once starting to work with a client on By Name List for possible RRH, TH, or PSH opening

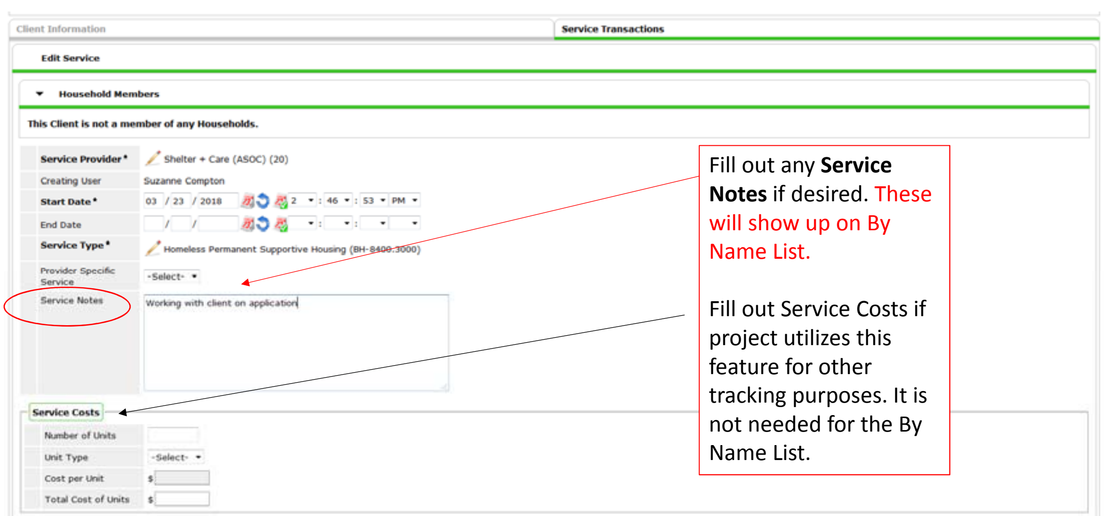
Enter HMIS data as soon as Provider makes contact with the client and will be proceeding with the application process.





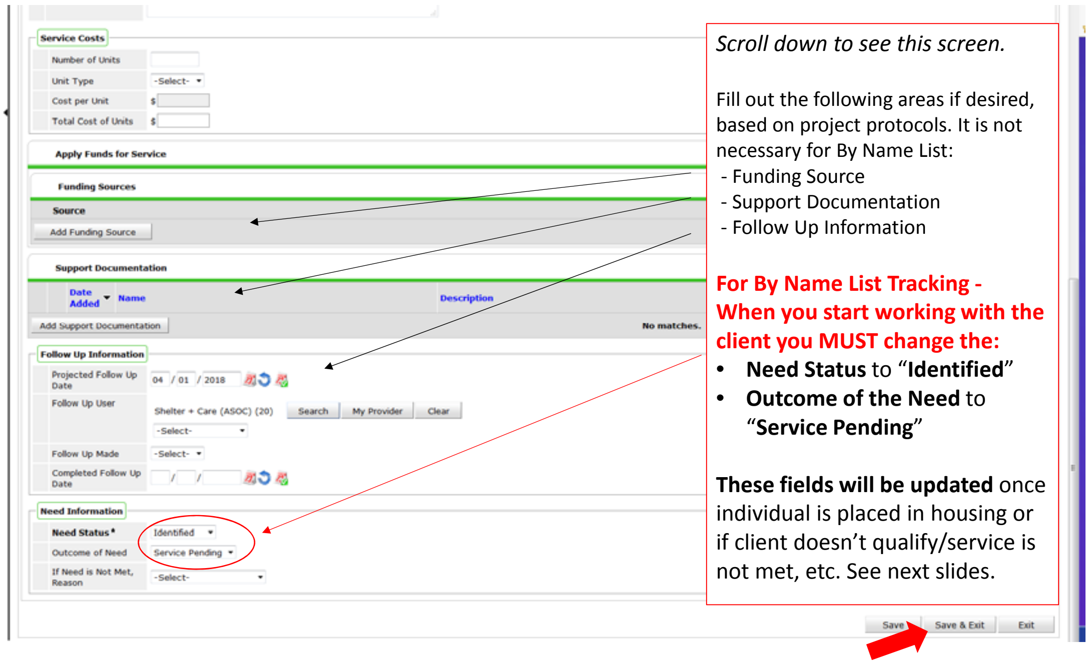
To show up on By Name List, the "Service Type" must be entered as one of the following:

- Homeless Permanent Supportive Housing (BH-8400.3000)
- Rapid Re-Housing Programs (BH-0500.7000)
- Transitional Housing/Shelter (BH-8600)



Fill out any **Service Notes** if desired. These will show up on By Name List.

Fill out Service Costs if project utilizes this feature for other tracking purposes. It is not needed for the By Name List.



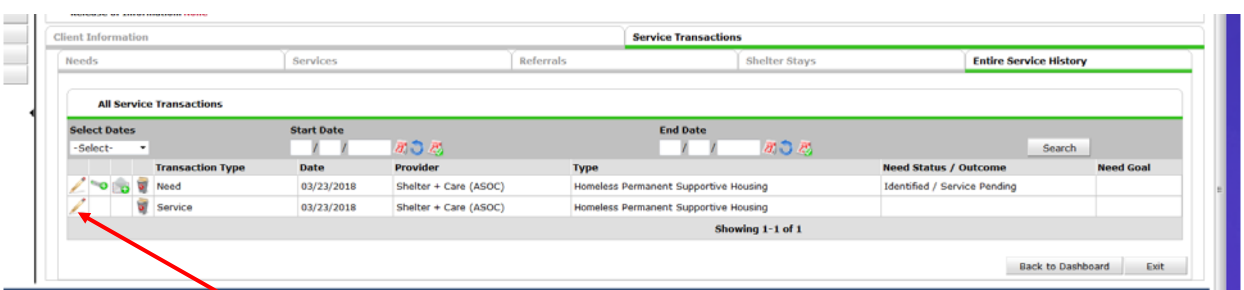
Scroll down to see this screen.

Fill out the following areas if desired, based on project protocols. It is not necessary for By Name List:
- Funding Source
- Support Documentation
- Follow Up Information

For By Name List Tracking - When you start working with the client you MUST change the:
- **Need Status** to "**Identified**"
- **Outcome of the Need** to "**Service Pending**"

These fields will be updated once individual is placed in housing or if client doesn't qualify/service is not met, etc. See next slides.

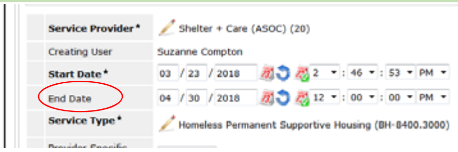
*If you entered the Service Transaction correctly, you should be able to go to **Entire Service History** and see that a Service and Need were created. A Need is automatically created when a Service Transaction is entered.*



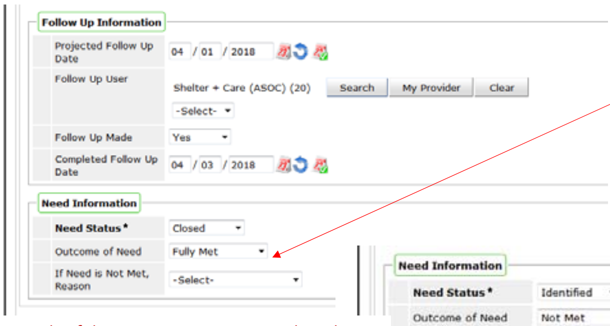
Update (edit) the Service to change the status when the client is:
1) accepted for your project's housing placement or
2) not accepted and will remain on the By Name List

Follow the steps on the next slide….

Steps to take by Provider when client is accepted or when client is not accepted, for any reason, for housing unit



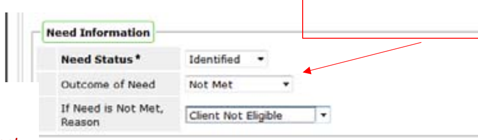
Enter a **End Date** for the Service Transaction and add any notes.



Update the **Need Information.**

If client was accepted, change Need Status to Closed and Outcome of Need to Fully Met.

If client was not accepted, change Outcome of Need to Not Met and change Reason to the applicable reason (Client Not Eligible, Client Refused, etc).



Outside of the Service Transaction, update the Vulnerability Index if needed or contact Coordinated Entry or last know entry/exit project with any other data that needs to be updated for this client, if applicable.

Be sure to **Save & Exit**

Removing person from By Name List

- There are various reasons why a person needs to be removed from the By Name List, including but not limited to housing placement or moving out of the county.
- Current policies require that only the CoC's Coordinated Entry Provider exit a client from Coordinated Entry in HMIS in order to remove them from the By Name List.
- Current policy requires faxing or emailing Coordinated Entry Provider a completed **HMIS EXIT FROM-Coordinated Entry** to notify them that the client must be exited.