CE Event: Subfolder

This section is for Coordinated Entry staff. For referrals for and from all other users, see *Chapter 4: Client Workspace: Menu options, Folders, and Subfolders*/Referrals: Folder

CE Event in ClientTrack allows Coordinated Entry users to refer and track referrals for clients to applicable agencies/organizations. All referrals from Coordinated Entry will be recorded in ClientTrack through the CE Event CE Event Referrals include recording new CE Events*, accepting referrals**, and updating CE Events***.

- * For instructions on recording new CE Events, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/CE Event/Recording New CE Event in the "HMIS Basic User 2025 Manual".
- ** For instructions on accepting referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/Referrals Service Provider Accepting Referrals in the "HMIS Basic User 2025 Manual".
- *** For instructions on updating new CE events, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/CE Events/Updating New CE Events in the "HMIS Basic User 2025 Manual".

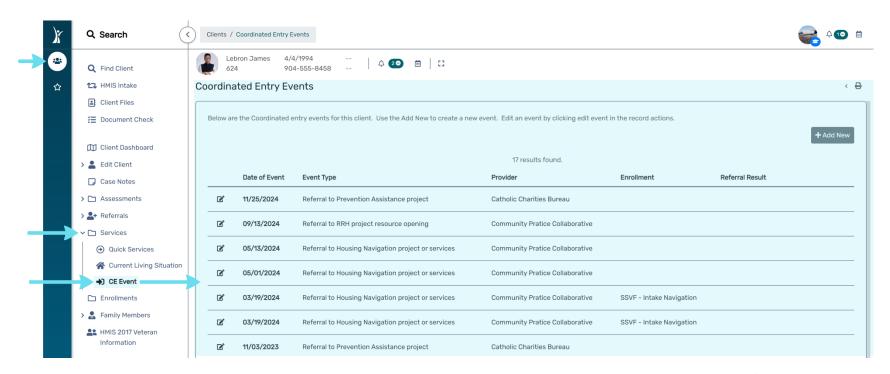
Steps to Navigate to the CE Event Subfolder

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the "Client Workspace".***

- * For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".
- ** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".
- *** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".

Step 2: Select the "Services" secondary sidebar* menu option. ClientTrack will navigate to the "Client Services" workspace container, and a dropdown menu will appear under the "Services" folder.

Step 3: Select the "CE Event" secondary sidebar dropdown menu option. ClientTrack will navigate to the "Coordinated Entry Events" workspace container.



^{*} For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the "HMIS Basic User 2025 Manual".

Recording New CE Event

This section is section 1 of 2 regarding CE (Coordinated Entry) Events*, Recording New CE Events, and Updating New CE Events*.

- * This section is for Coordinated Entry staff. For referrals for and from all other users, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder in the "HMIS Basic User 2025 Manual".
- ** For instructions on updating new CE events, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/CE Events/Updating New CE Events in the "HMIS Basic User 2025 Manual".

Steps to Recording New CE Events via the CE Event Subfolder

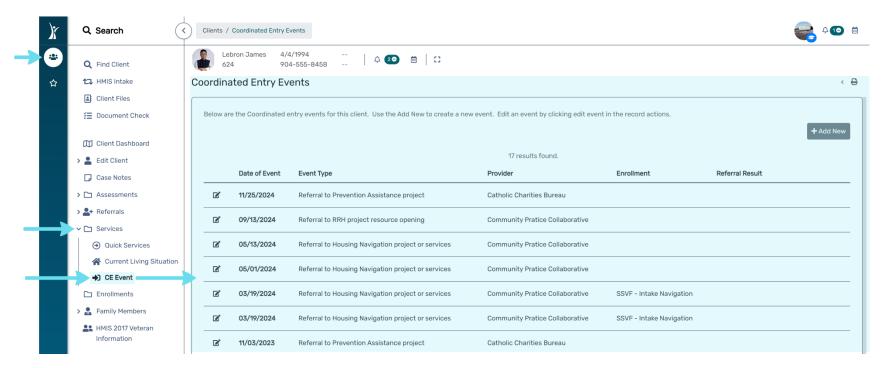
Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the "Client Workspace".***

- * For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".
- ** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".
- *** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".

Step 2: Select the "Services" secondary sidebar* menu option. ClientTrack will navigate to the "Client Services" workspace container, and a dropdown menu will appear under the "Services" folder.

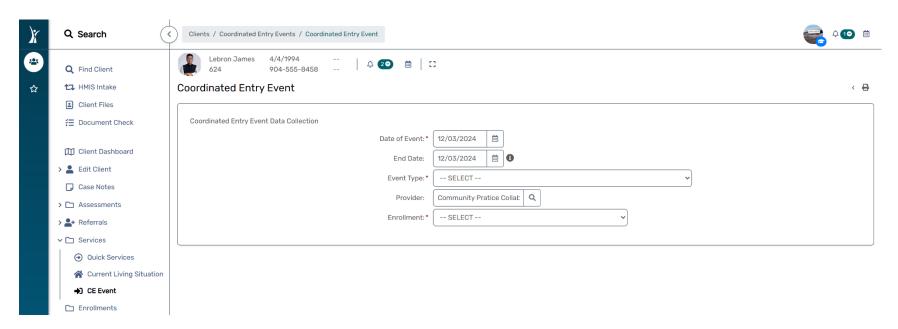
* For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the "HMIS Basic User 2025 Manual".

Step 3: Select the "CE Event" secondary sidebar dropdown menu option. ClientTrack will navigate to the "Coordinated Entry Events" workspace container.



Coordinated Entry (CE) Events

Step 4: Click, "Add New" at the top right in the referral container space. ClientTrack will navigate to the "Coordinated Entry Events" workspace container.



Coordinated Entry Event Form

Step 5: Fill out the Coordinated Entry Event Data Collection form as applicable*. Required elements are marked with a (*).

* If a housing project** is selected as the "Event Type", the Coordinated Entry Event Data Collection form will populate a "Referral Result" and "Result Date". Referral Result and Result dates will be recorded when updating CE Events***.

**Housing Project examples include Emergency Shelters (ES), Rapid Rehousing projects (RRH), Permanent Housing (PH), Permanent Supportive Housing (PSH), and Housing Stability Vouchers.

*** For instructions on updating new CE events, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/CE Events/Updating New CE Events in the "HMIS Basic User 2025 Manual".

Step 6: Click the "Save" button. ClientTrack will navigate to the Coordinated Entry Events workspace container. The created CE event will be visible in the "Coordinated Entry Events" workspace container. An identical non-duplicated referral will be visible in the "Client Referrals"* workspace container.

Tips and Tricks - Email Authorized Clients to Referring Agency



To have ClientTrack to draft an automated email to send to the service provider, navigate to the Referrals subfolder and to select "Email Authorized" on the Voucher and Information Release" referall form step.

Tips and Tricks – CE Event – Email Authorized Client to Referring Agency

* For instructions on how service providers accept referrals, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder/Referrals - Service Provider – Accepting Referrals in the "HMIS Basic User 2025 Manual".

Tips and Tricks - Backdating CE Events - Duplicate Referrals



Backdating CE Events for existing referrals will create duplicate referrals. Email hmis@changinghomelessness.org to request deletion of duplicate referalls.

Tips and Tricks – Backdating CE Events – Preventing Duplicate Referrals

Updating New CE Events

This section is section 2 of 2 regarding CE (Coordinated Entry) Events*, Recording New CE Events**, and Updating New CE Events.

* This section is for Coordinated Entry staff. For referrals for and from all other users, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Referrals: Folder in the "HMIS Basic User 2025 Manual".

** For instructions on recording new CE events, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/CE Events/Recording New CE Event in the "HMIS Basic User 2025 Manual".

Steps to Recording Accepted Referrals via the Referrals Folder

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the "Client Workspace".***

* For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".

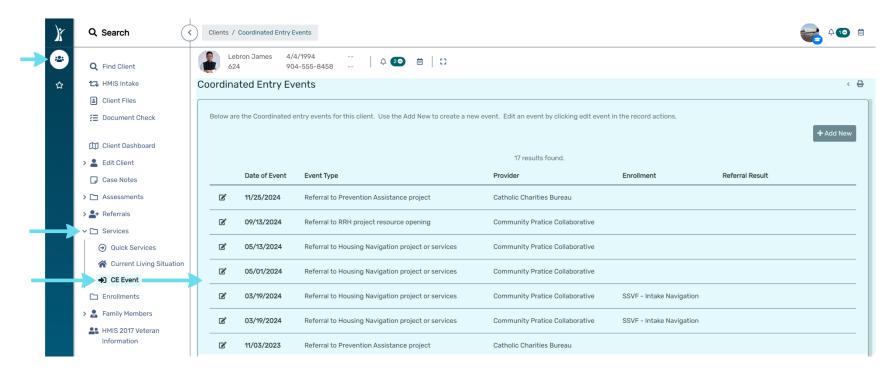
** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".

*** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".

Step 2: Select the "Services" secondary sidebar* menu option. ClientTrack will navigate to the "Client Services" workspace container, and a dropdown menu will appear under the "Services" folder.

*For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the "HMIS Basic User 2025 Manual".

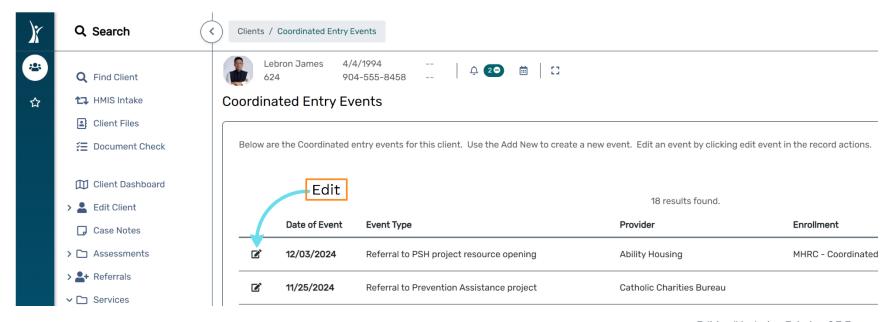
Step 3: Select the "CE Event" secondary sidebar dropdown menu option. ClientTrack will navigate to the "Coordinated Entry Events" workspace container.



Coordinated Entry (CE) Events

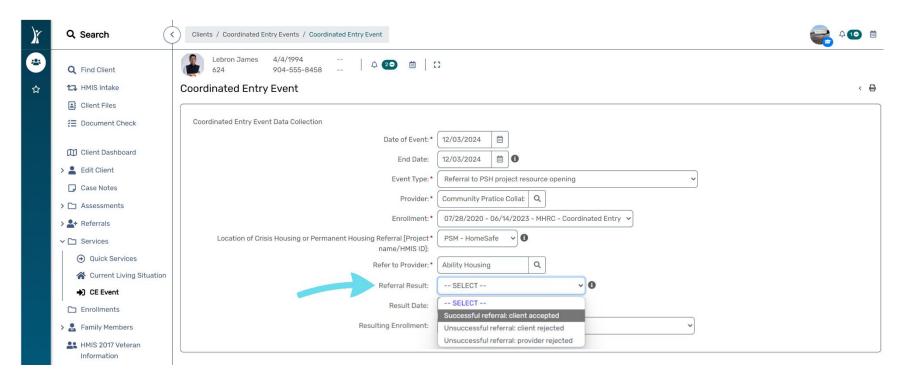
Step 4: Click the edit icon next to the appropriate CE Event. ClientTrack will navigate to the "Coordinated Entry Event" workspace container.

*To view a list of icons and buttons used in Client Track HMIS, see Chapter 1: HMIS ClientTrack Basics/Key Terminology and Navigation/Icons and Buttons in the "HMIS Basic User 2025 Manual".



Editing/Updating Existing CE Events

Step 5: Under Referral Result, select "Successful referral: client accepted" as the status.



Coordinated Entry Event - Selecting Referral Result

Step 6: Under "Result Date", select the date the referral was accepted.

Step 7: Under "Resulting Enrollment", select the appropriate enrollment if applicable.

Step 8: Click "Save" to save or click "Cancel" to exit without saving. ClientTrack will navigate to the "Coordinated Entry Events" in the "Referral" workspace container.