

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.

* 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.

The screenshot displays the ClientTrack interface. On the left, a dark sidebar contains a search bar and a list of menu items. The 'Services' folder is expanded, and the 'CE Event' option is highlighted with a blue arrow. The main content area shows the 'Coordinated Entry Events' workspace for client Lebron James. It includes a table with 17 results, listing event dates, types, providers, and enrollment details.

Date of Event	Event Type	Provider	Enrollment	Referral Result
11/25/2024	Referral to Prevention Assistance project	Catholic Charities Bureau		
09/13/2024	Referral to RRH project resource opening	Community Praticce Collaborative		
05/13/2024	Referral to Housing Navigation project or services	Community Praticce Collaborative		
05/01/2024	Referral to Housing Navigation project or services	Community Praticce Collaborative		
03/19/2024	Referral to Housing Navigation project or services	Community Praticce Collaborative	SSVF - Intake Navigation	
03/19/2024	Referral to Housing Navigation project or services	Community Praticce Collaborative	SSVF - Intake Navigation	
11/03/2023	Referral to Prevention Assistance project	Catholic Charities Bureau		

Coordinated Entry (CE) Events

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.

The screenshot shows the ClientTrack interface. On the left, a dark sidebar contains a list of navigation options. A red arrow points to the 'CE Event' option, which is highlighted in blue. The main content area is titled 'Coordinated Entry Events' and shows a list of 17 results. The table below lists the events with columns for Date of Event, Event Type, Provider, Enrollment, and Referral Result.

Date of Event	Event Type	Provider	Enrollment	Referral Result
11/25/2024	Referral to Prevention Assistance project	Catholic Charities Bureau		
09/13/2024	Referral to RRH project resource opening	Community Praticce Collaborative		
05/13/2024	Referral to Housing Navigation project or services	Community Praticce Collaborative		
05/01/2024	Referral to Housing Navigation project or services	Community Praticce Collaborative		
03/19/2024	Referral to Housing Navigation project or services	Community Praticce Collaborative	SSVF - Intake Navigation	
03/19/2024	Referral to Housing Navigation project or services	Community Praticce Collaborative	SSVF - Intake Navigation	
11/03/2023	Referral to Prevention Assistance project	Catholic Charities Bureau		

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.

The screenshot displays a web application interface for managing client events. On the left is a dark sidebar with a search bar and a list of navigation items: Find Client, HMIS Intake, Client Files, Document Check, Client Dashboard, Edit Client, Case Notes, Assessments, Referrals, Services (with sub-items: Quick Services, Current Living Situation, CE Event), and Enrollments. The top header shows the breadcrumb 'Clients / Coordinated Entry Events / Coordinated Entry Event' and user profile icons. The main content area features a client profile for 'Lebron James' (DOB: 4/4/1994, ID: 624, Phone: 904-555-8458) and a 'Coordinated Entry Event' form. The form is titled 'Coordinated Entry Event Data Collection' and contains the following fields: 'Date of Event:' with a date picker set to 12/03/2024; 'End Date:' with a date picker set to 12/03/2024 and an information icon; 'Event Type:' with a dropdown menu showing '-- SELECT --'; 'Provider:' with a text input containing 'Community Practice Collat' and a search icon; and 'Enrollment:' with a dropdown menu showing '-- SELECT --'.

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" referral 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 referrals.

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”.*

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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.

Search

Clients / Coordinated Entry Events

Lebron James 624 4/4/1994 904-555-8458

Coordinated Entry Events

Below are the Coordinated entry events for this client. Use the Add New to create a new event. Edit an event by clicking edit event in the record actions.

+ Add New


17 results found.

Date of Event	Event Type	Provider	Enrollment	Referral Result
11/25/2024	Referral to Prevention Assistance project	Catholic Charities Bureau		
09/13/2024	Referral to RRH project resource opening	Community Praticce Collaborative		
05/13/2024	Referral to Housing Navigation project or services	Community Praticce Collaborative		
05/01/2024	Referral to Housing Navigation project or services	Community Praticce Collaborative		
03/19/2024	Referral to Housing Navigation project or services	Community Praticce Collaborative	SSVF - Intake Navigation	
03/19/2024	Referral to Housing Navigation project or services	Community Praticce Collaborative	SSVF - Intake Navigation	
11/03/2023	Referral to Prevention Assistance project	Catholic Charities Bureau		

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”.*



Search

Find Client

HMIS Intake

Client Files

Document Check

Client Dashboard

Edit Client

Case Notes


Assessments

Referrals

Services

←



Clients / Coordinated Entry Events





Lebron James
624

4/4/1994
904-555-8458

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  2







Coordinated Entry Events

Below are the Coordinated entry events for this client. Use the Add New to create a new event. Edit an event by clicking edit event in the record actions.

Edit

18 results found.

	Date of Event	Event Type	Provider	Enrollment
	12/03/2024	Referral to PSH project resource opening	Ability Housing	MHRC - Coordinated
	11/25/2024	Referral to Prevention Assistance project	Catholic Charities Bureau	

Editing/Updating Existing CE Events

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

Coordinated Entry Event

Coordinated Entry Event Data Collection

Date of Event: 12/03/2024

End Date: 12/03/2024

Event Type: Referral to PSH project resource opening

Provider: Community Practice Collat

Enrollment: 07/28/2020 - 06/14/2023 - MHRC - Coordinated Entry

Location of Crisis Housing or Permanent Housing Referral [Project name/HMIS ID]: PSM - HomeSafe

Refer to Provider: Ability Housing

Referral Result: -- SELECT --

Result Date: -- SELECT --

Resulting Enrollment: Unsuccessful referral: client rejected

Successful referral: client accepted

Unsuccessful referral: provider rejected

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.