**Access Point Enrollment and Referral to Emergency Shelter Workflow**

| Step | Action |
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| 1 | Switch to COORDINATED ENTRY - BoSCoC (OH-507) or COORDINATED ENTRY - MCHCOC (OH-504). |
| 2 | Search for the head of household. Click the pencil to the left of the head of household's name in the search results. If the client is not already in Clarity, create the client(s). For multiple clients, create the household. |
| 3 | In the Client Profile, navigate to the PROGRAMS tab. |
| 4 | Under the PROGRAMS: AVAILABLE section, Click the down arrow to the right of the appropriate Access Point. |
| 5 | To include other household members in the enrollment, toggle each household member on in the Include group members section. |
| 6 | Click ENROLL. |
| 7 | Enter the head of household's data in the enrollment screen. |
| 8 | When entering a single client, click Save. When entering data for a household, click Save & Next to enter the next household member's data. |
| 9 | Click Save & Close. Save & Close may not work if the enrollment is missing data. Scroll up in the enrollment screen to find warnings about missing data. If all required data has been entered, the Enrollment screen will close, showing a list of Assessments for the head of household. |
| 10 | Click the Events tab. |
| 11 | Click the down arrow to the right of Problem Solving/Diversion/Rapid Resolution intervention or service in the Services list. |
| 12 | Record the date of unsuccessful Diversion in the Date field. |
| 13 | Record the Result: Client housed/re-housed in a safe alternative as “No”. |
| 14 | Optional: Record an Event Note. |
| 15 | Click Submit. |
| 16 | Click the Assessments tab to the right of the Events tab in the head of household’s enrollment. |
| 17 | Complete the Current Living Situation Assessment. |
| 18 | Use the appropriate assessment to refer the client to a permanent housing queue.  If the head of household is a veteran, complete the Veteran Referral without VI-SPDAT Assessment. Record the appropriate date and set Assessment Level as Housing Needs Assessment. Once clicking Save, the PROGRAM ELIGIBILITY DETERMINATION screen will appear.  If the head of household is not a veteran, refer from an existing valid VI-SPDAT by navigating to the client’s Assessments tab and clicking the appropriate VI-SPDAT’s ELIGIBILITY button. The PROGRAM ELIGIBILITY DETERMINATION screen will appear.  If the head of household has no existing valid VI-SPDAT, complete a new VI-SPDAT Assessment. Record the appropriate date and set Assessment Level as Housing Needs Assessment. Upon saving the VI-SPDAT in HMIS, the PROGRAM ELIGIBILITY DETERMINATION screen will appear.  BoS only: For more information about VI-SPDAT guidance see the CE Operational Manual at <https://cohhio.org/boscoc/coordinated-entry/> |
| 19 | Complete the Referral to Shelter Assessment by clicking START next to the assessment. |
| 20 | Record the appropriate date and set Assessment Level as Crisis Needs Assessment. |
| 21 | Click SAVE. |
| 22 | Under PROGRAM ELIGIBILITY DETERMINATION, toggle on the BoSCoC Shelter Queue or MCHCoC Shelter Queue and Click REFER DIRECTLY TO COMMUNITY QUEUE(S). |
| 23 | Under REFERRAL: ADD TO CQ, optionally add a note and then click SEND REFERRAL. |

**Referral**

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| 24 | Click the SEARCH magnifying glass in the top right of the screen. A REFERRALS option will appear to the right of CASELOAD. Click REFERRALS. |
| 25 | On the Referrals screen, navigate to Community Queue. |
| 26 | Select the correct community queue from the four options in blue boxes. When referring to ES, select either BoSCoC Shelter Queue or MCHCoC Shelter Queue. |
| 27 | Confirm that the Active Agency is set to the ES agency that is receiving the referral. Click SEARCH or the Active Agency will revert to your current agency. |
| 28 | Search for the head of household’s name. In the search results, click the pencil to the left of the head of household's name. |
| 29 | Under the REASSIGN section, select the ES program the household is being referred to. If the REASSIGN section is not visible, start again from the beginning of the Referral section of this workflow. |
| 30 | Click SAVE CHANGES. |