



New York State Balance of State Continuum of Care

Coordinated Entry Checklist

Before the Meeting

- CE Coordinator to export CE list from HMIS to spreadsheet.
- Manually add domestic violence and/or anonymous participants with identifier.
- Add additional information to the spreadsheet as needed (participant updates, etc.).
- Distribute list to CE committee members (optional).
- Programs to email current vacancies to CE Coordinator.

During the Meeting

- Discuss current program vacancies.
- Case conferencing:
 - Participant updates
 - Level of care (SMI, SUD, inpatient)
 - Special population referrals:
 - Veterans (VA, SSVF, etc.)
 - HIV/AIDS
 - Youth/young adults
 - DV services
 - Mainstream referrals – SPOA, SOAR, etc.
 - Discuss removal of participants from list
- Committee to make referrals and placement.

After the Meeting

- “Email Referral Template” to be completed by referring agency.
- Accepting agency notifies participant of referral and conducts program intake.
- Referring agency discharges participant from CE list in HMIS.
- Discharge any participants from CE list in HMIS who are no longer interested in housing (moved, self-resolved, loss of contact, etc.). For participants that have been lost to contact, recommended three months of contact attempts before removing.

Best Practices

- If spreadsheet is being emailed, use password protection and encryption.
- Use a master spreadsheet and add most recently updated HMIS list to a new tab.
- Anyone can view the list in HMIS at any time.
- List program vacancies at the top of the spreadsheet.