



River Valleys Continuum of Care Coordinated Entry System: Guide for Program Managers and Coordinated Entry Leads

Coordinated Entry Start Up

New to Coordinated Entry Assessment

- If your agency is new to CE Assessment and/or you have new staff who will be completing assessments, please see the [Training Checklist for Assessors](#) for more information.
- All CE Assessment Sites must sign a [CE Partner Agreement](#).
- All CE Assessors are required to take CE Assessor Training through the CoC. Total time for training and follow-up is approximately 5 hours. This does not include time involved for New User Training for HMIS. Please see the [Training Checklist for Assessors](#) for more information.

New to Coordinated Entry Housing Referrals

- If your agency is new to requesting and processing referrals through CE, please see the [Training Checklist for Housing Providers](#) for more information.
- All Housing Providers utilizing CE must sign a [CE Partner Agreement](#) and fill out a [Program Eligibility Form](#) for each housing project.
- All staff who will be working with CE referrals are required to take CE Housing Provider Training through the CoC. Total time for training and follow-up is approximately 2 hours. This does not include time involved for New User Training for HMIS. Please see the [Training Checklist for Housing Providers](#) for more information.

On- going Support and Collaboration

- **CE Provider's Meeting:** Every 2nd Friday of the month at 9:00 via Zoom. These meetings are for discussing and reviewing CE operations and procedures. Current trends or situations that have been arising with assessors and/or housing providers can be brought up and if any changes in the HMIS workflow for CE occur, it is also reviewed at the meeting.
- **Case Conferencing:** There is regional Case Conferencing once a month. Assessors and Housing Providers are encouraged to attend. Referrals pending with Housing Providers and active participants on the CE list are discussed. Please see the [CE Case Conferencing Procedures](#) for more information. Let the [CE Specialist](#) know if someone should be added to the meeting invites and email list for Case Conferencing.
- **List Outreach:** All Assessment site agencies and Housing Providers participate in List Outreach twice per year (typically January and August). A list of active participants in CE is sent to staff to contact and either update their assessment or exit them from CE as needed. Approximately 15



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names are sent to each staff member who is assisting with List Outreach. Training for List Outreach procedures and steps is available to new staff or those wanting a review.

- **CE Staff:** The CE Specialist is available by phone and [email](#) to answer any questions related to CE Assessments and Housing Referrals. Training related to CE Procedures can also be provided to your agency as needed.
- All Coordinated Entry documents can be found here: <https://www.rivervalleyscoc.org/ce-participating-agency-resources.html>.
- More information about the River Valleys Continuum of Care can be found here: <https://www.rivervalleyscoc.org/>.
- For any general HMIS related questions, contact the [helpdesk](#) for assistance.

Agency/Project Changes

- If CE Assessors and/or Housing staff has changed at your agency, please let the [CE Specialist](#) know.
- If your agency has a change in CE programming (change in assessment schedule or referral schedule), contact the [CE Specialist](#) to determine next steps and what is needed to be communicated to other Agency Partners.
- If there are any changes in your project's eligibility criteria or something similar, another [Program Eligibility Form](#) must be filled out.